

BrokerMetrics® Office

User Manual



June 2008

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Access & Customization Features

Minimum System Requirements

Before installing the BrokerMetrics® software or getting set up, it is important to ensure that your system meets the minimum requirements to operate the program, and that your PC is configured correctly.

1. Check with your system's administrator to confirm that your PC has the following:
 - a. Pentium III processor (or more recent)
 - b. Windows XP or Windows VISTA as its operating system
 - c. At least 60Mb of available RAM
 - d. At least 65Mb of Hard Disk Storage
 - e. Internet Explorer 4.0 (or more recent) as its Browser
2. Confirm the appropriate screen resolution:
 - f. The BrokerMetrics® program is best viewed with the screen resolution set at 1024 x 768.
 - g. To confirm that your PC is set appropriately:
 - h. Close (or minimize) all of your open programs and documents so that your desktop is in view.
 - i. Right mouse-click on any open space on the desktop to display a menu, and then click on the **Properties** option.
 - j. On the dialog box titled "Display Properties," click on the **Settings** tab at the top.
 - k. In the lower left-hand corner you will see a moveable gauge titled "Screen Resolution." By depressing your left mouse button and holding it down over the arrow on the gauge, drag the arrow to adjust your monitor's screen resolution to 1024 X 768.
 - l. Click on **Apply**. Your screen will go black for a moment as it resets. You may then be asked if you want to keep the new settings. Click on **Yes** and close out the dialog box

You are now ready to go through Registration.

Registration

After confirming that your system meets the minimum requirements and is configured appropriately, you must complete the BrokerMetrics® registration process.

Prerequisites

In order to complete the registration process you must::

1. Be at a PC on which you are going to use BrokerMetrics®.
2. Have access to the internet.
3. Have access to your email.
3. Have your BrokerMetrics® User Name and Password. If you have not received either a User Name or a Password, or if you have misplaced your User Name or Password, check with your Training Coordinator or call the Terradatum Hotline **1-888-212-4793 ext. 2**.

Procedure

1. Start the registration process by opening your internet browser and typing in the following URL provided to you by your training coordinator. Have your BrokerMetrics® User Name and Password. If you have not received either a User Name or a Password, or if you have misplaced your User Name or Password, check with your Training Coordinator or call the Terradatum Hotline **1-888-212-4793 ext. 2**.
4. At the BrokerMetrics® registration page specifically designed for your firm, click on the BrokerMetrics® link.
5. At the System Requirements page, click on **Continue** to go to the Login page.
6. Type in the User Name and Password you received, and click on **Login**.
7. You will now go to a registration page (see example below) and be asked to provide some basic information (e.g., challenge question and E-mail address). Fill in the required fields and click on **Submit**.

The screenshot shows the 'BrokerMetrics Registration' page. At the top, it says 'Verify that your computer meets the minimum requirements', 'Login to begin registering', 'Complete the registration form', 'Email verification', and 'Activate your account and download the program'. Below this is a form with the following fields: 'User Name:' (text box with 'smith-d'), 'Password:' (password box with 6 dots), 'Password Verification:' (password box with 6 dots), 'Forgotten Password Question:' (dropdown menu with 'What city would you like to visit?'), 'Forgotten Password Answer:' (text box with 'change me'), 'Email Address:' (text box with 'change me'), 'Email Address Verify:' (text box with 'change me'), and 'Do you have a website:' (radio buttons for 'Yes' and 'No', with 'No' selected). A 'Submit' button is at the bottom right. A small asterisk and 'Required Field' text are at the bottom left.

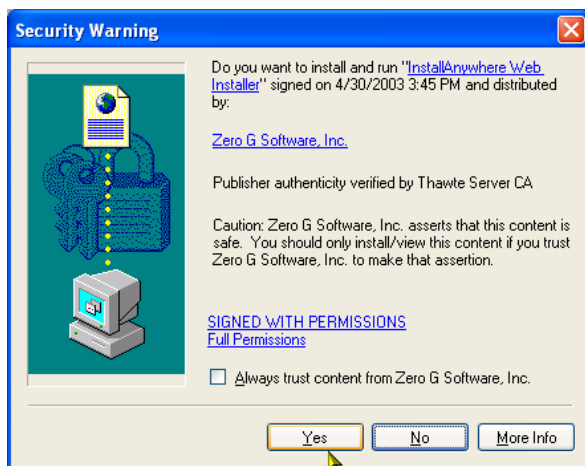
8. The Registration form will cause the BrokerMetrics® system to generate an email to you.

The screenshot shows the 'TERRADATUM' logo at the top. Below it is the 'BrokerMetrics Email Verification' page. It says 'Verify that your computer meets the minimum requirements', 'Login to begin registering', 'Complete the registration form', 'Email verification', and 'Activate your account and download the program'. Below this is a large heading 'An Email has been sent'. Underneath, it says 'You have successfully registered. An email will arrive shortly containing the link to download and install the software.' and 'Thank You, The Terradatum Team'.

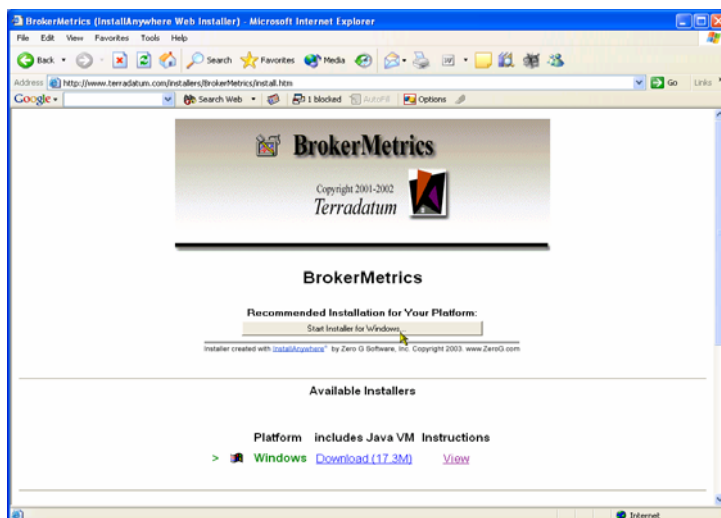
9. When you receive the email, click on the link in the message to begin the installation process.

Installation

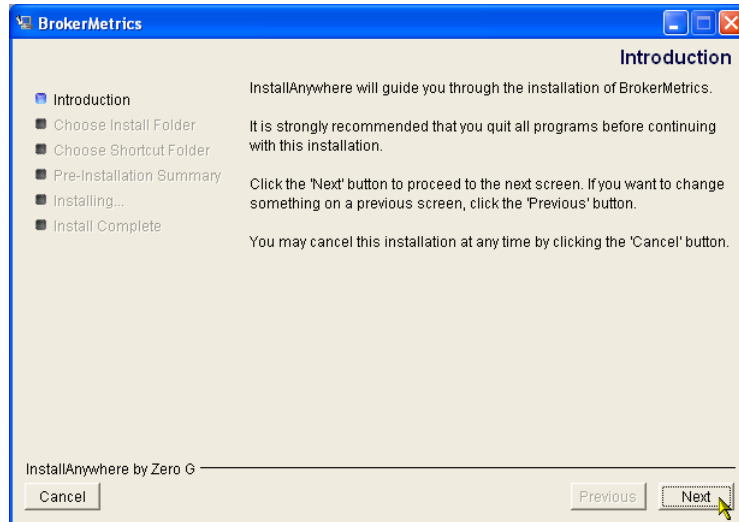
- Clicking on the link in the email will bring up a "Security Warning" dialog box. Click on **Yes**.



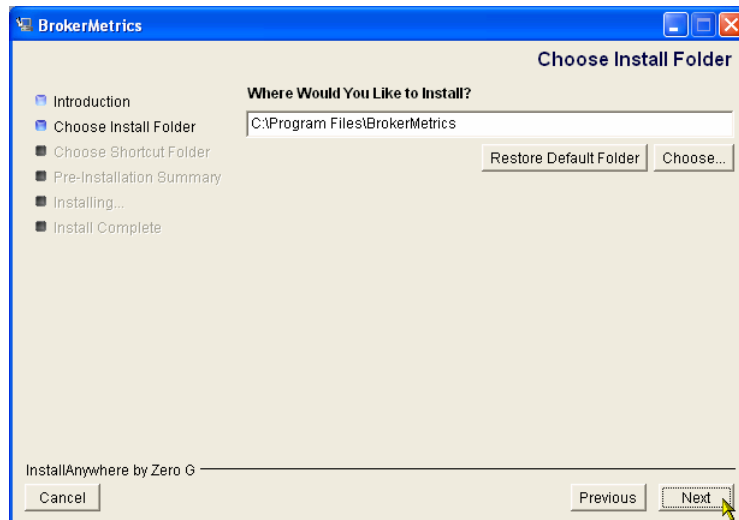
- Click on **Start Installer for Windows** to begin the installation process, which may take a few moments.



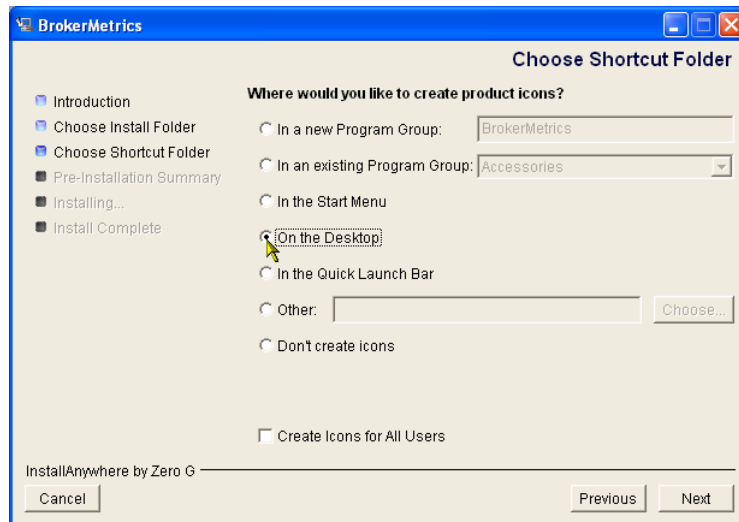
4. Click on **Next**.



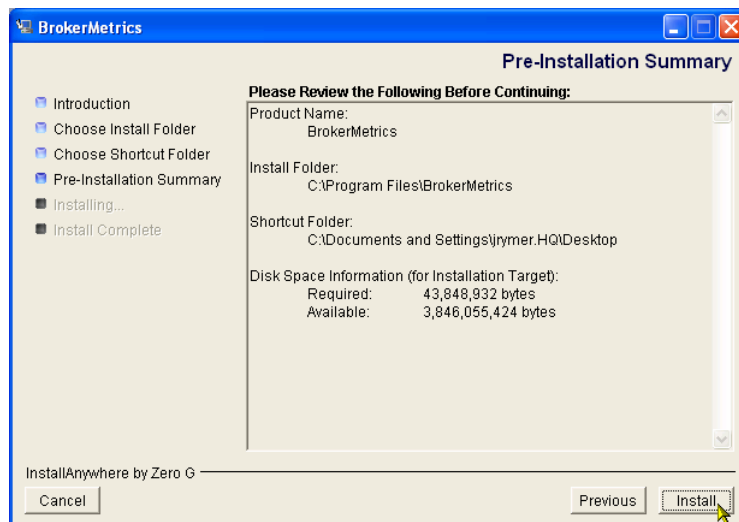
5. Click on **Next**.



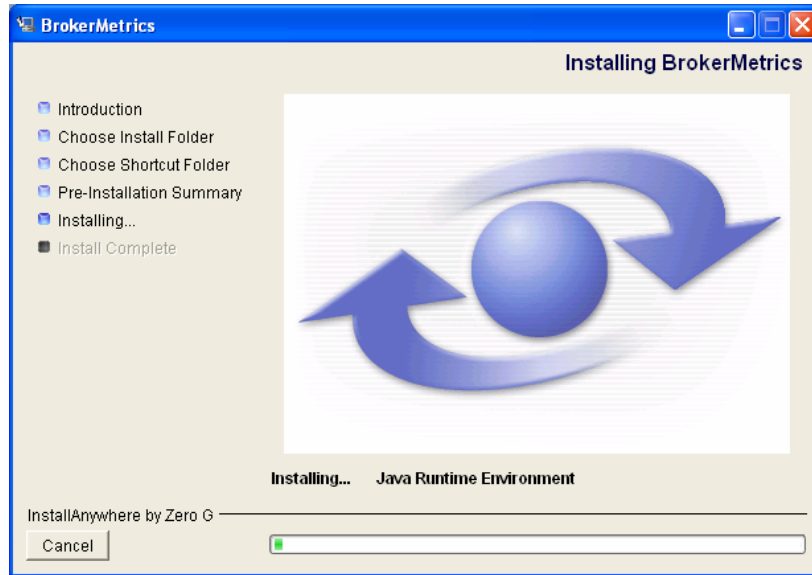
6. Click the **On the Desktop** radio button, then click **Next**.



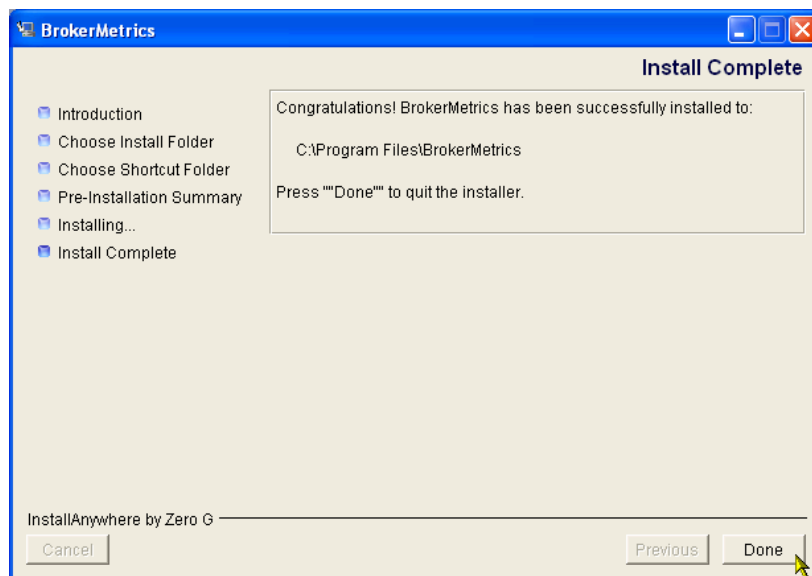
7. Click on **Install**.



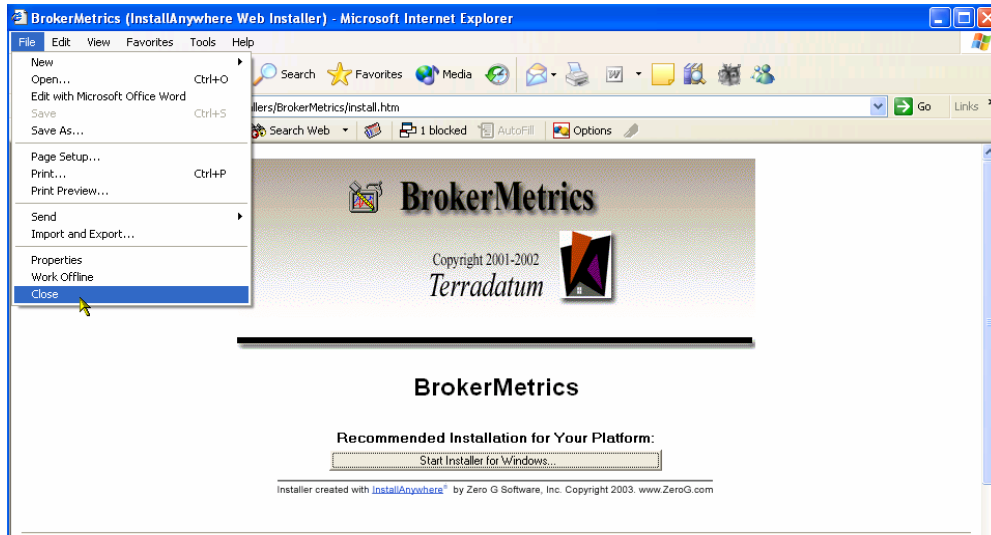
8. Wait for the installation to complete; this will take a few moments.



9. Click on **Done**.

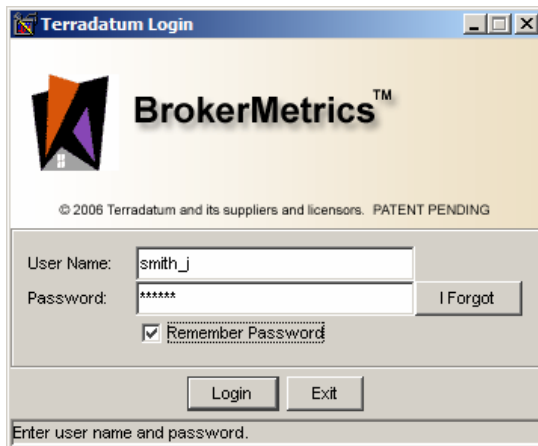


10. Finish by closing your browser.



Congratulations!
You are now ready to log in and begin using BrokerMetrics®!

Login



1. Once BrokerMetrics® has been installed properly, double-click on the BrokerMetrics® icon on your desktop to open the program.
2. Enter your User Name and Password and click the **Login** button

You may install BrokerMetrics® on all necessary computers, i.e. where you do your real estate work (home, office, laptop).

BrokerMetrics® recognizes each user based on their unique ID and Password, and displays the appropriate views for each user's role.

The system is dynamic and updated daily so there can be small data variances over time (e.g. pending to sold status changes will always add market share to the applicable COE data).

Preferences Menu

Where data input and customization begin....

BrokerMetrics® allows the user to input key office/company data and personalize various system configurations. Please take the time to familiarize yourself with these functions. They will pay many long-term dividends from a program “power” and “ease-of-use” perspective.



The next several pages will guide you through the process of setting up:

- **My Options**
 - Input proprietary financial information
 - Input company goals & objectives
- **My Areas**
 - Customize MLS system geographies
- **My Searches**
 - Create and save searches
- **Custom Market Share (CMS) Setup**
 - Integrate your personal market information into the market share tools
- **Market Growth Office Setup (GIS)**
 - Create groups of offices so you can track their growth
- **Market Share Coverage Setup**
 - Define your market service area and identify your prime competitors for real-time comparison tracking.
- **My Market Setup Wizard**
 - Define your market and your competition, so you can see at a glance where you stand in relation to your competitors.

My Options

Key office/company information is input here.

We will review three tabs in My Options:

- **Financial Tab**
- **Goals Tab**
- **Monitor Performance Tab**

Financial

This information is integrated into various tools (see below) throughout the program; it is usually obtained from management reports and/or your CFO.

The screenshot shows the 'Options' dialog box with the 'Financial' tab selected. The 'Financial' tab is highlighted with a red box. Below the tab, there is a dropdown menu for 'Select an office from the list to adjust any of the values for that office.' The dropdown shows 'Boston, Boston - 711 Grand Avenue'. Below this, there are several input fields with their current values: 'Office Admin Fee: 6.0 %', 'Monthly Desk Cost: \$ 1,750', 'Number of Desks: 48.0', 'Average Commission Side: 2.66 %', 'Minimum Target Desk Cost Coverage: 110 %', 'Minimum Target Return on Revenue: 5 %', and 'Retained Dollar %: 22.0 %' for 'Company' and '78.0 %' for 'Agent'. The 'Save Changes' button is circled in red. At the bottom right, there are 'OK' and 'Cancel' buttons.

1. Place mouse cursor in input box and type the desired value.
2. Tab to move between fields or to leave a field (this activates the Save Changes button).
3. When all desired values have been entered, click on the Save Changes button.

Metrics and Ratios used on the Financial Tab:

Office Admin Fee

The percentage "administration fee" that the company deducts from the total commission (Gross Commission Income or GCI) before they split with the agents. The user needs to input the appropriate figure into the system so that the Net \$ calculations in Performance Management are as accurate as possible.

Monthly Desk Cost

Reflects the total operating expenses of the office or company on a monthly per desk basis.

Number of Desks

The total number of desks that the office/company uses for expense amortization purposes.

Average Commission Side

This is the office/company's true commission percentage (per transaction side) after all deal "concessions" have been made. It is obtained from company and/or office financial records.

Minimum Target Desk Cost Coverage

The breakeven point where the firm's revenues exactly equal its expenses. The default setting is 100% indicating this "breakeven" point between revenues and expenses.

Minimum Target Return on Revenue

The target set by the firm for its return goal, i.e. net income/GCI. The default setting is 0% indicating the "breakeven" point (no profit or loss).

Retained Dollar % (Company Dollar / GCI)

The ratio of Company \$ compared to GCI as a percentage. Company dollar is usually comprised of two components; the admin fee taken off the top of the total GCI received; and then the office/company side of the commission splits with the agents.

Goals

Allows for the input of yearly production goals (as a percentage of last year's actuals). The goals section of BrokerMetrics® will then display compliance information and provides measurements vs. previous times (year, quarter, and month). The default setting for this tab will be filled in. You can adjust the targets to see the impact of different goals on your financials.

Options

User Info | Financial | **Goals** | Monitor Performance

Select an office from the list to adjust any of the values for that office.

Enterprise Defaults

"i" button provides additional information

Listings 95.0 %

Closings 105.0 %

Set your goals for the current calendar year using the following methodology:

90% = 10% decrease
100% = the Same
110% = 10% increase

The Goals set reflect a percentage of last year's "Listings" and "Closings" production

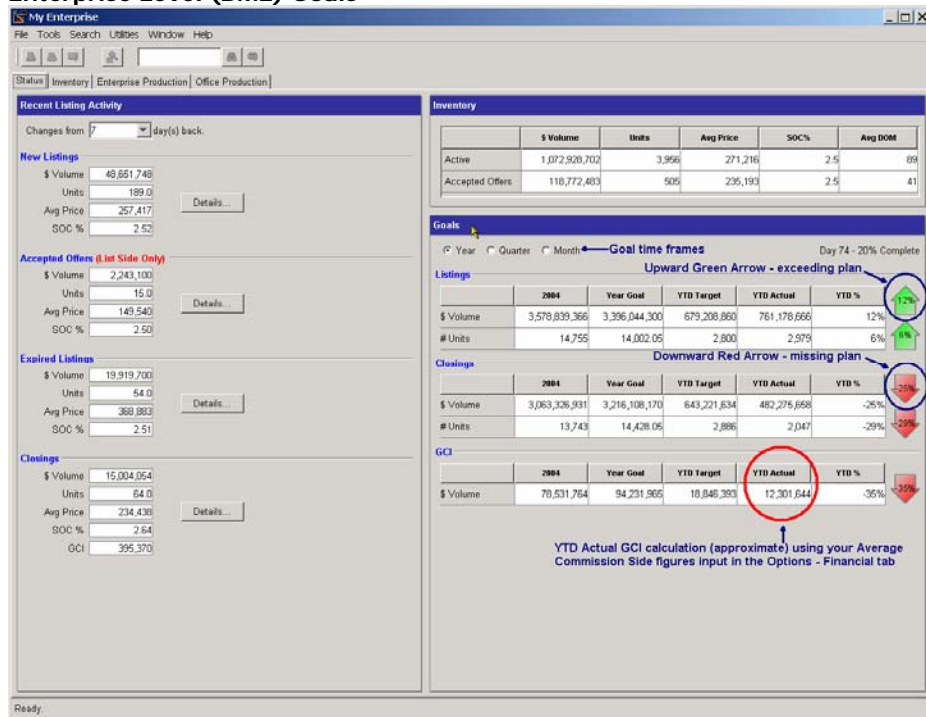
* Listings - the number of listings taken in the last calendar year whether they sold or not

* Closings - the number of successfully closed list and sell side transactions

Save Changes

OK Cancel

Enterprise Level (BME) Goals



- Current performance can be measured against last year's performance and this year's goals & objectives.
- Arrow icons give the user at-a-glance information as to whether performance is meeting plan or not. An upward green arrow signifies that performance is exceeding the plan and a red downward arrow the opposite.
- A YTD "Actual" GCI calculation is performed. It is approximate to the extent that it only reflects MLS transactions and the commission amount used in the calculation is from the Options – Financial information.

Monitor Performance

This is where company goals and objectives are input into the BrokerMetrics® system. These are the key operating metrics that will be measured and closely tracked throughout the system, i.e. agent analysis; office analysis; enterprise analysis; recruiting, etc. They are chosen because small improvements to these metrics pay large dividends to the company's bottom line.

The screenshot shows the 'Options' dialog box with the 'Monitor Performance' tab selected. At the top, there are tabs for 'User Info', 'Financial', 'Goals', and 'Monitor Performance'. Below the tabs, a dropdown menu is set to 'Enterprise Defaults'. The main section is titled 'Enter office goals:' and contains six input fields with their respective units: 'Return On Revenue (ROR)' at 10 %, 'Desk Cost Coverage (DCC)' at 200.0 %, 'Selling Office Commission (SOC)' at 2.65 %, 'Average Marketing Time (AMT)' at 6 weeks, 'Closed-To-List Ratio (C/L)' at 90 %, and 'Transactions-To-List Ratio (T/L)' at 1.5 one decimal place. A blue text block below the fields reads: 'Input operating metrics that, if achieved, would bring substantial, financial benefits to the firm. Use the Performance Management capabilities of BrokerMetrics to measure these objectives over time for compliance.' At the bottom right are buttons for 'Save Changes', 'OK', and 'Cancel'.

Metric	Value	Unit
Return On Revenue (ROR)	10	%
Desk Cost Coverage (DCC)	200.0	%
Selling Office Commission (SOC)	2.65	%
Average Marketing Time (AMT)	6	weeks
Closed-To-List Ratio (C/L)	90	%
Transactions-To-List Ratio (T/L)	1.5	one decimal place

Metrics and Ratios in the Monitor Performance Tab:

Return on Revenue (ROR)

Percentage of GCI revenue that is "Net \$" to the company after all commissions and expenses have been paid. The breakeven point of (0%) is input through the Financial tab. It is the most direct measure of the overall operational efficiency.

Desk Cost Coverage (DCC)

Measures gross profit vs. gross expense as a percentage. The breakeven point of 100% is input through the Financial tab.

Selling Office Commission (SOC)

The average commission offered to co-operating brokers. The list side commission is then inferred by local custom, e.g. if 6% commissions are the market custom and the cooperating broker is being offered 3%, then the listing broker is probably getting 3% as well.

Average Marketing Time (AMT)

Measures the average number of weeks that the office/company needs to expend marketing dollars on any given listing (on average) before they go under contract or expire.

Closed-to-List Ratio (C/L)

Measures the number of listings that successfully close relative to the number that were taken (over the last 12 complete months) on a percentage basis.

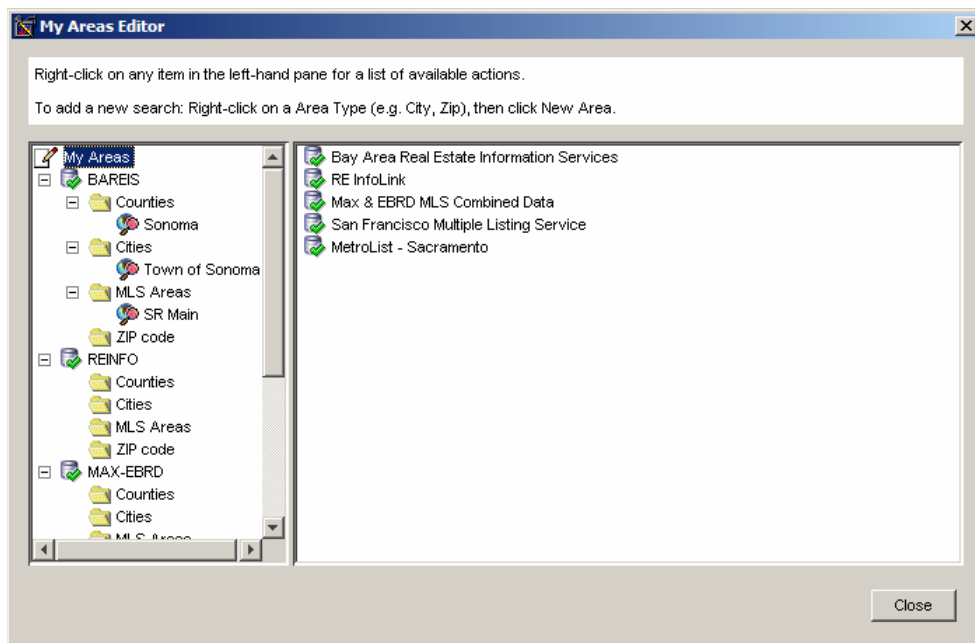
Transaction-to-List Ratio (T/L)

Measures the total # of closed transactions versus the # of listings that were taken (over the last 12 complete months) on a percentage basis.

My Areas

Create and save groups of areas (cities, counties, MLS areas and zip codes) to be displayed in the area pick-lists on all search screens. This feature lessens the need to hunt-and-peck through the long lists of areas that are contained in most large, regional MLS systems.

Click on **My Areas** on the Preferences menu to display this window:



The left side will list:

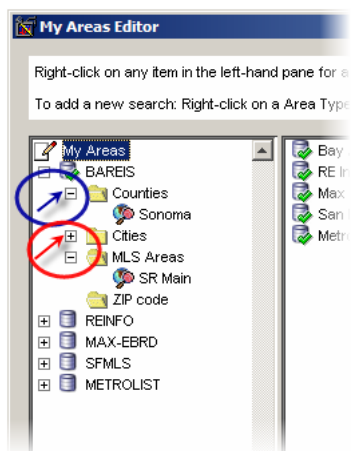
Each **MLS** you are authorized to access; within each MLS will be a folder for:

Area Types available for each MLS; under each Area Type will be the:

Saved Areas (if any) you have created for each Area Type.

All folders and lists will be expanded when the window is opened.

Click on the minus sign next to a folder to collapse it (hide its contents); click on the plus sign to display the contents:

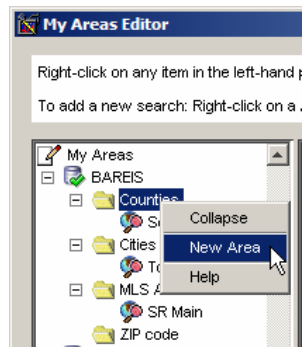
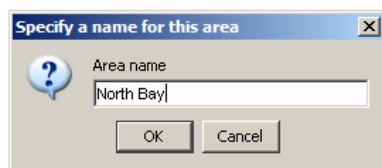


New Saved Area

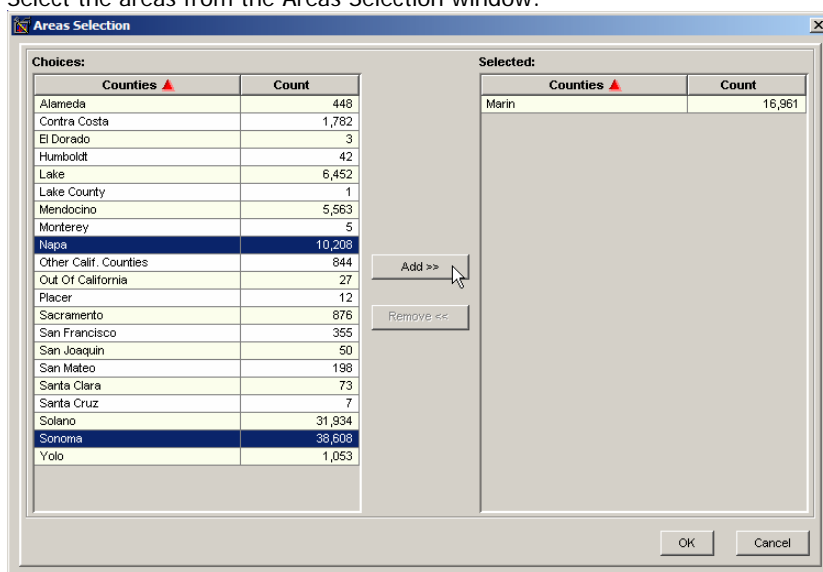
New Saved Area – Preferences Menu

Click on **My Areas** on the Preferences Menu.
Right-click on an Area Type and click on **New Area**:

Enter a name for your area and click **OK**:

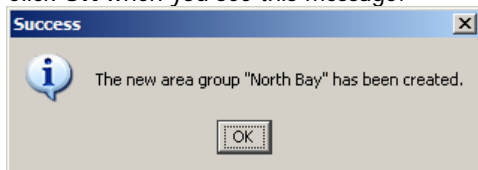


Select the areas from the Areas Selection window:



- Click on a row or multiple rows (using Shift-Click or Ctrl-Click), then on **Add**, or
- Double-click on a row to move the selection to the Selected pane.
- Click **OK**.

Click **OK** when you see this message:



The new saved area will be listed in the Area Type picklist on all search screens.

New Saved Area - Search Screen

After you've selected an Area Type and made your area selections on any search screen, click on the **Save** button:

Area Type: ZIP code

ZIP code	Count
95401	2,783
95402	7
95403	3,355
95404	3,247
95405	1,546
95407	2,738
95408	1
95409	2,539

Enter a name for your area and click **OK**:

Specify a name for this area

Area name
Santa Rosa Zips

Click **OK** when you see this message:

Success

The new area group "Santa Rosa Zips" has been created.

The new saved area will be listed in the Area Type picklist on all search screens.

To make changes to a Saved Area, right-click on the Area Name, then on **Delete** or **Rename**.
To add or remove selections included in the Saved Area, click on the **Add** or **Remove** buttons.

Rename a Saved Area

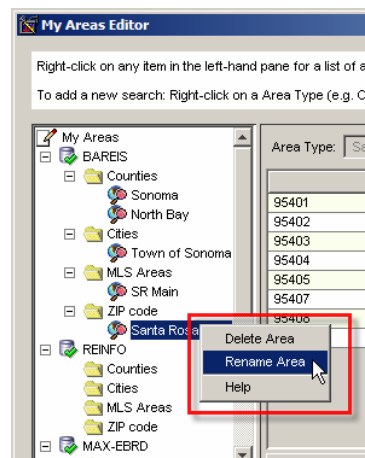
Click on **My Areas** on the Preferences Menu.

Right-click on the saved area you wish to rename and click on **Rename Area**:

Enter the new name, and click **OK**:

Specify a name for this area

Area name
Santa Rosa Zip Codes

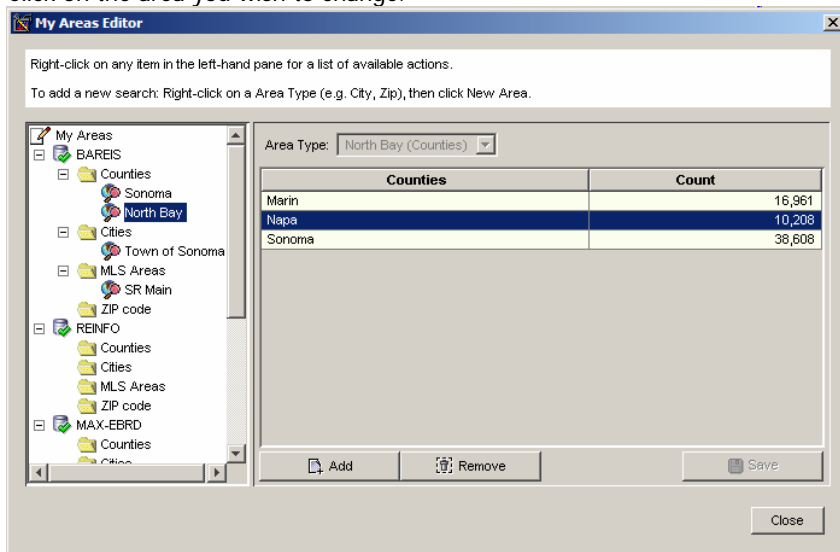


Modify a Saved Area

Modify Saved Areas – Preferences Menu

Click on **My Areas** on the Preferences Menu.

Click on the area you wish to change.



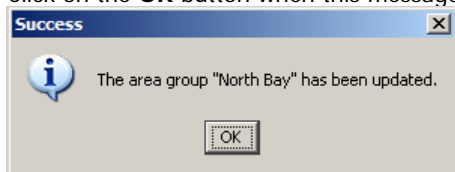
Make the desired changes:

Click on a row, then on **Remove** to delete the area from the group, and/or

Click on **Add** to display the Area Selection window.

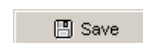
Be sure to click the **Save** button when you've completed the modifications to the saved area.

Click on the **OK** button when this message is displayed:

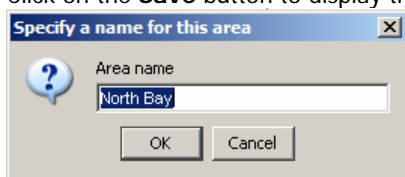


Modify Saved Areas – Search Screen

After a saved area has been selected on a search screen, changing any of the selected areas will activate the **Save** button.



Click on the **Save** button to display this window:

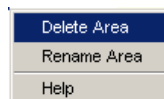


You may either click **OK** to save the revised areas under the same name, or enter a different name to save the revised areas as a new group (the "old" group will remain intact, with the original set of areas).

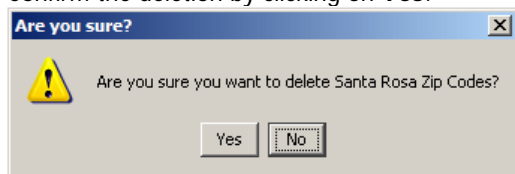
Delete a Saved Area

Click on **My Areas** on the Preferences Menu.

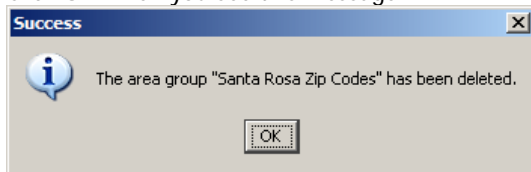
Right-click on the saved area you wish to delete and click on **Delete Area**:



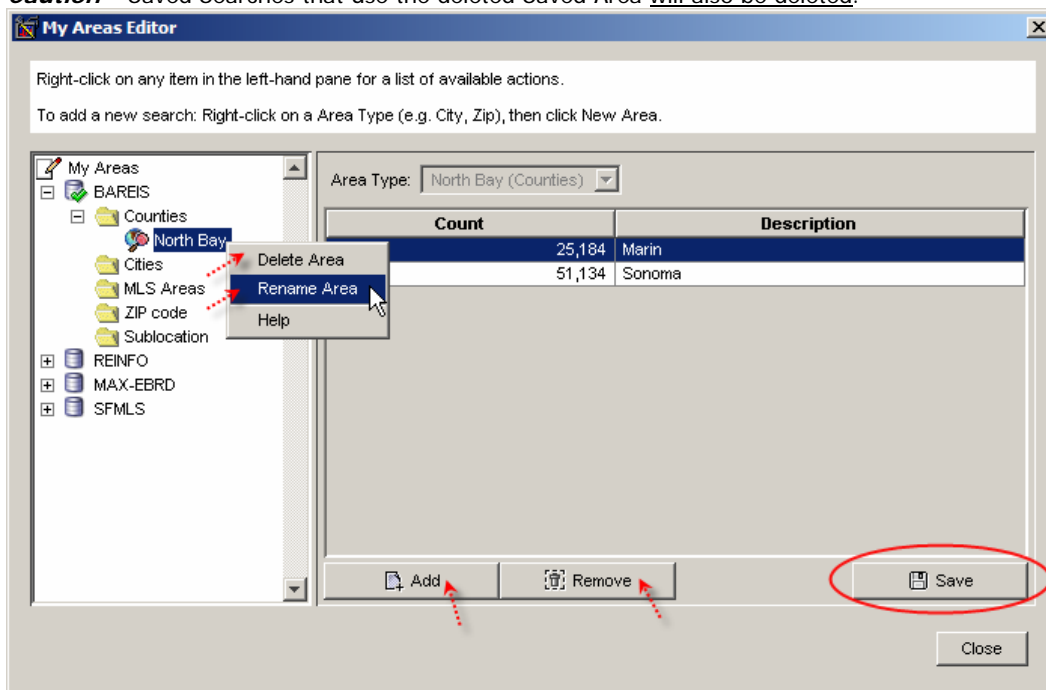
Confirm the deletion by clicking on **Yes**:



Click **OK** when you see this message:



Caution – Saved Searches that use the deleted Saved Area will also be deleted.



Be sure to click on the Save button before closing the editor.

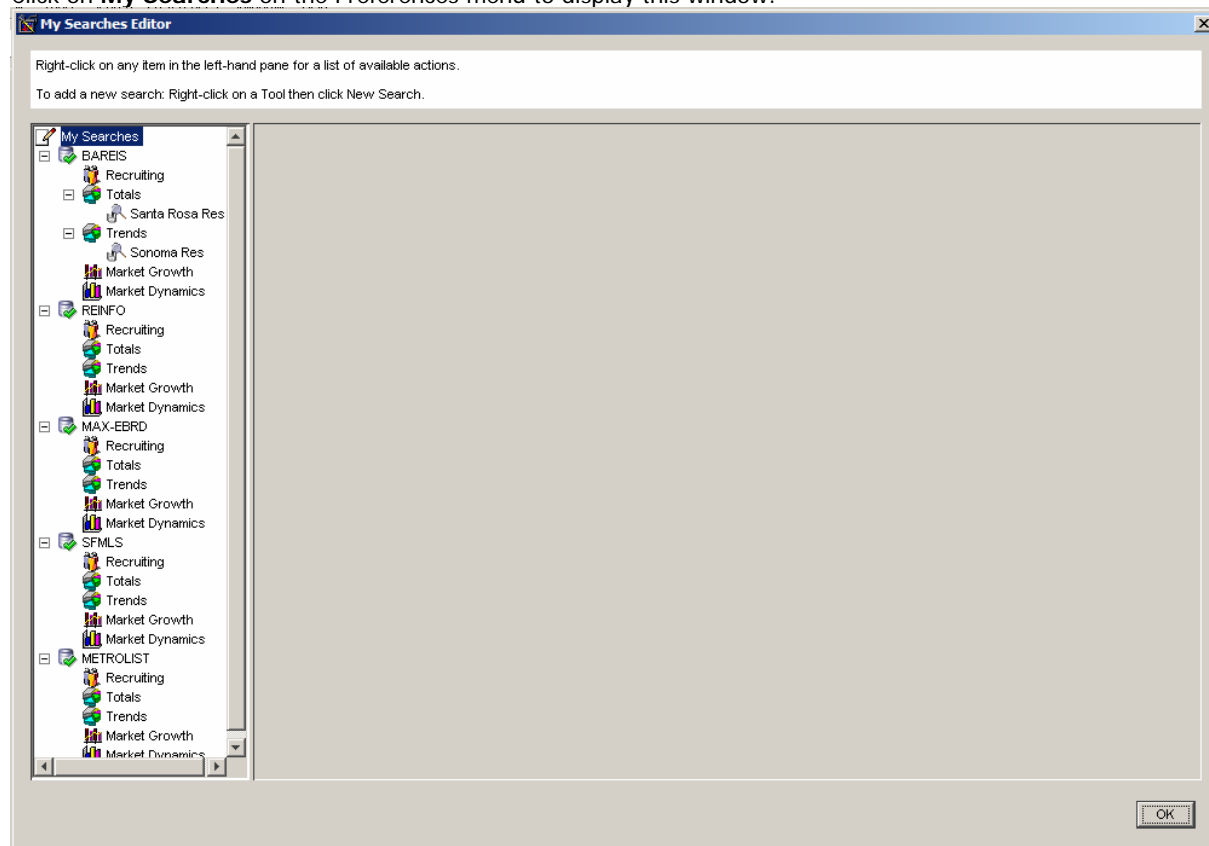
My Searches

Use this feature to create saved searches for the following tools:

- Recruiting (Agent Market Share)
- Market Share Totals
- Market Share Trends
- Market Growth
- Market Dynamics

Searches may also be saved from the search screens; instructions for both methods are included below.

Click on **My Searches** on the Preferences menu to display this window:



The left pane will list:

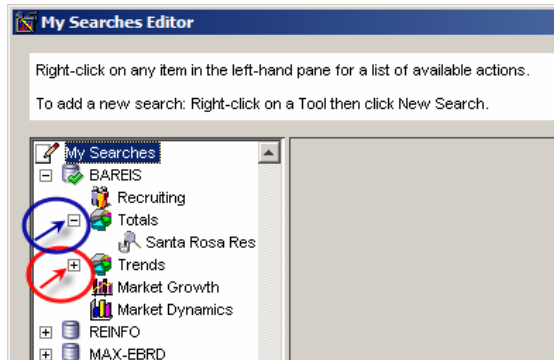
The **MLS's** you are authorized to access; within each MLS will be a folder for:

The **Tools** you (or your company) have subscribed to that utilize the search function; under each tool will be the:

Saved searches (if any) you have created for each tool.

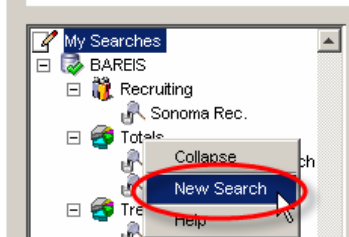
All folders and lists will be expanded when the window is opened.

Click on the minus sign next to a MLS name or tool name to collapse the list (hide its contents); click on the plus sign to display the list:

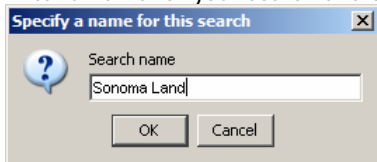


New Search

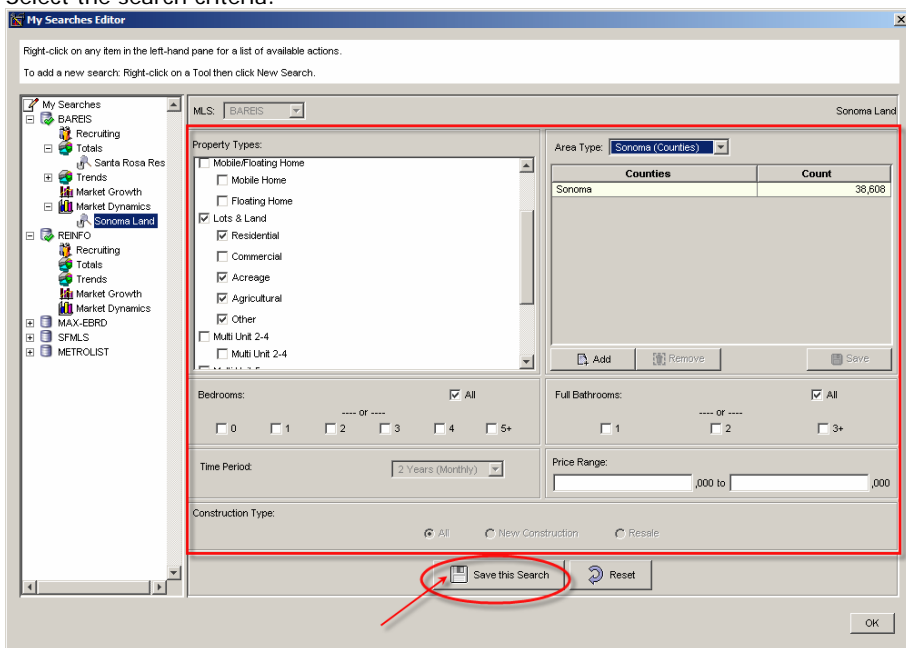
Click on **My Searches** on the Preferences Menu.
Right-click on a Tool and click on **New Search**:



Enter a name for your search and click **OK**:



Select the search criteria:



Then click on **Save this Search**.

New Search - Search Screen

After you've selected the desired criteria (Property Types and Areas must be selected), click on the **Save this Search** button at the top of the window:

The screenshot shows the 'Search' window with the following details:

- Buttons: Clear, **Save this Search** (highlighted), Search
- Text: To optimize system performance, the maximum number of records that will be returned is 2,000.
- MLS: BAREIS
- Property Types: ☒ Residential, ☒ Single Family, ☐ Condo/Coop, ☐ Farms/Ranches, ☐ Mobile/Floating Home, ☐ Mobile Home, ☐ Floating Home, ☐ Lots & Land, ☐ Residential, ☐ Commercial, ☐ Acreage
- Area Type: North Bay (Counties)
- Table:

Counties	Count
Marin	16,961
Napa	10,208
Sonoma	38,608
- Buttons: Add, Remove, Save
- Date Range: Last 12 Months, 3/1/2006 to 2/28/2007
- Price Range: ,000 to ,000
- \$ Volume: Minimum \$,000, Maximum \$,000
- # Units: Minimum # 4, Maximum #
- Construction Type: ☒ All, ☐ New Construction, ☐ Resale

Enter a name for the search:

The dialog box titled 'Specify a name for this search' contains a text field with the value 'North Bay Recruiting' and buttons for 'OK' and 'Cancel'.

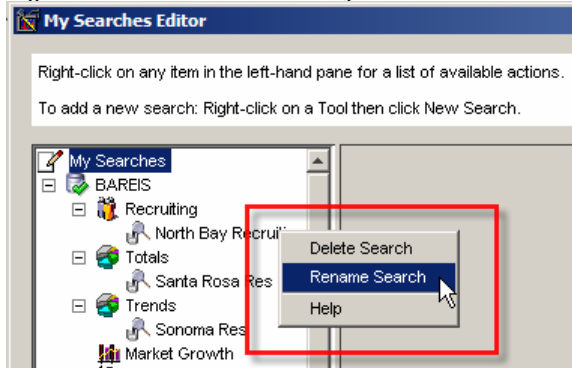
Click **OK** when you see this message:

The 'Success' dialog box displays the message: 'The search "North Bay Recruiting" has been created.' with an 'OK' button.

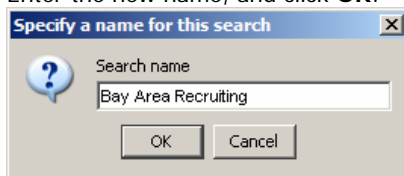
Rename a Saved Search

Click on **My Searches** on the Preferences Menu.

Right-click on the saved search you wish to rename and click on **Rename Search**:



Enter the new name, and click **OK**:

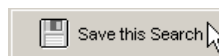


Modify a Saved Search

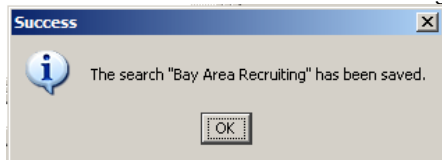
Click on **My Searches** on the Preferences Menu.

Click on the search you wish to change.

Click on the **Save this Search** button at the bottom of the window.

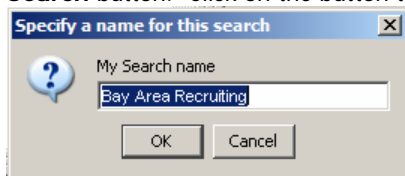


Click on the **OK** button when this message is displayed:



Modify a Saved Search – Search Screen

After a saved search has been selected on a search screen, changing any of the criteria will activate the **Save this Search** button. Click on the button to display this window:

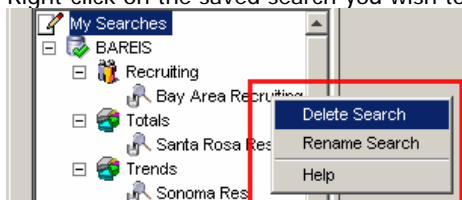


You may either click **OK** to save the revised criteria under the same name, or enter a different name to save the revised criteria as a new search (the "old" search will remain intact, with the original set of criteria).

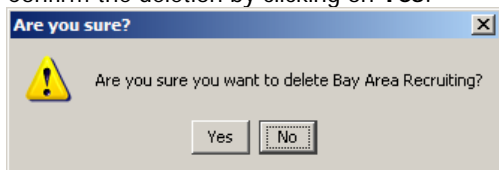
Delete a Saved Search

Click on **My Searches** on the Preferences Menu.

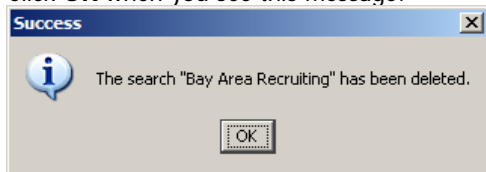
Right-click on the saved search you wish to delete and click on **Delete Search**:



Confirm the deletion by clicking on **Yes**:



Click **OK** when you see this message:



Custom Market Share (CMS) Setup

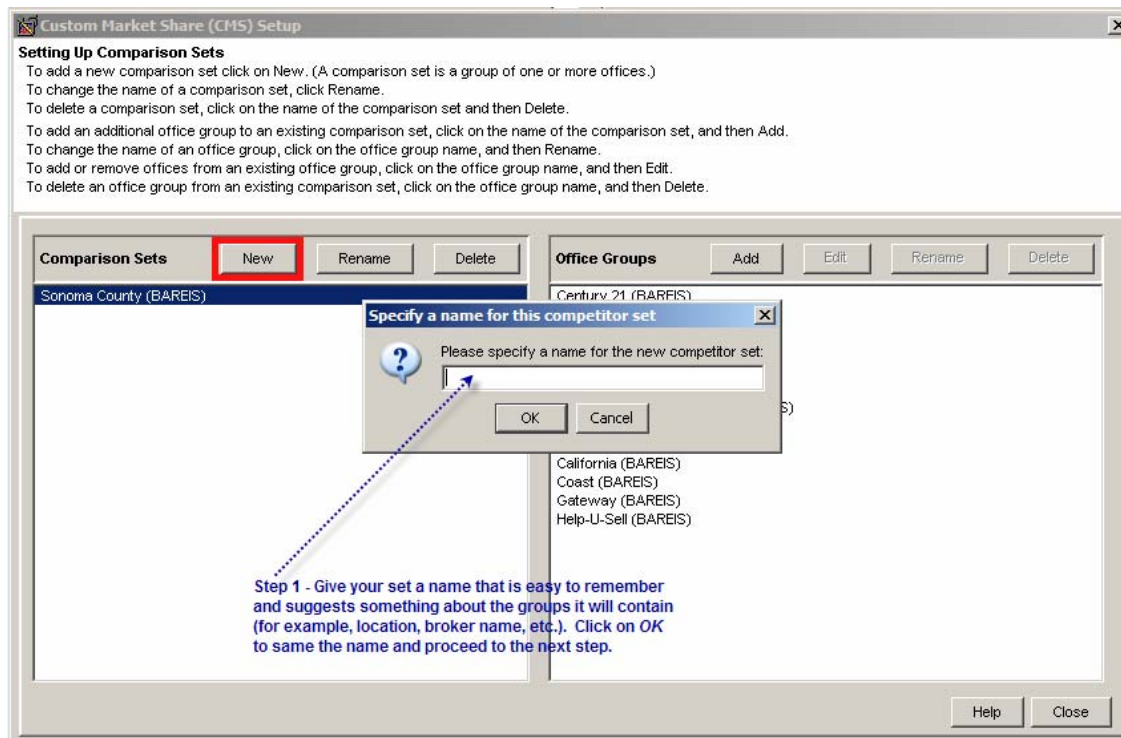
This utility allows you to set up and customize comparison sets of competitors to use in the Market Share tool for market analysis purposes.

Comparison sets are groups of competitors.

Competitors are groups of one or more offices. For example, you might wish to compare the offices of XYZ agency in Napa with the offices of ABC agency and DEF agency in Napa. You would first create a Competitor Set Called Napa, and then set up three competitor groups called ABC, DEF and XYZ.

Step 1

Click the **New** tab and type in an easy-to-remember name for the group you are defining. Then click the **OK** button to create the set.



Step 2

Select the offices for the group; name and save the group.

1. Sort on the name column to group like-named offices together.
2. Choose the desired offices and move them to the right (double-click the row, or click the row and then click the **Add>** button).
3. Name the group and click on **OK**. The first group is now complete.

Custom Market Share (CMS) Setup

Select Offices
To add one or more offices to a group, click the desired office, then on Add. You may also use Shift-Click and Ctrl-Click to select multiple offices, then on Add.

MLS: **BAREIS**

1. Sort on the Name column to facilitate selection of offices.

☐ Only show offices with number of agents greater than or equal to **2**

☐ Only show offices with total volume greater than or equal to **1000000**

MLS	Office ID	Name	Address	City	Zip	# Agents	\$ Volume
BAREIS	ZBEST	Best Real Estate	9925 San Pa...			0	565,000
BAREIS	CCESAR	Best Way Real Estate Inc.	97 Dobbins S...	Vacaville	95688	9	9,682,350
BAREIS	DBETWC	Better Homes	1511 Treat Bl...	Walnut ...	94598	3	1,620,000
BAREIS	DBETTIC	Better Homes Alamo	1451 Danville...	Alamo	94507	2	1,602,900
BAREIS	CBETHOM	Better Homes Realty	3000 Delta F...	Antioch	94509	4	5,314,000
BAREIS	ZBETHOME	Better Homes Realty	1451 Danville...			0	485,000
BAREIS	DBETHOM	Better Homes Realty	6652 Alhamb...	Martinez	94553	2	520,000
BAREIS	DBHR	Better Homes Realty	3701 Mt Diabl...	Lafayette	94549	1	585,000
BAREIS	KHOSAL	Better Homes Realty	202 Beechnu...	Hercules	94547	1	715,950
BAREIS	DBETHM	Better Homes Realty	2958 D treat ...	Concord	94518	1	410,000
BAREIS	DBETTER	Better Homes Realty	120 A Spring...	Vallejo	94591	8	26,065,404
BAREIS	CBTRHM	Better Homes Realty	12702 Roadr...	Penn V...	95946	0	320,000
BAREIS	DBETTER2	Better Homes Realty Emery Bay	5610 Bay St	Emeryville	94608	3	645,000
BAREIS	DBETTER3	Better Homes Realty, Lenoni	3433 Broad...	Americ...	94503	2	13,984,000
BAREIS	GBSAND1	Beverly Sanders Realty Co	320 S State St	Ukiah	95482	21	28,241,249
BAREIS	GBSAND2	Beverly Sanders Realty Co	10751 Main St	Potter V...	95469	0	547,000
BAREIS	GBSAND3	Beverly Sanders Realty Co	1772 S. Main ...	Willits	95490	8	8,113,500
BAREIS	ABEYOND	Beyond Value	3001 Bridge...	Sausalito	94965	1	550,000
BAREIS	BBIG01	Big Oak Realty & Investment	P O Box 11364	Santa R...	95406	1	1,541,950
BAREIS	GRUBY	Big River Realty	10483 Lansin...	Mendoc...	95460	4	8,587,000
BAREIS	BBGVLY3	Big Valley Prop.-Cobb Mtn.	16360 Highw...	Cobb	95426	0	235,000
BAREIS	BBGVLY2	Big Valley Prop.-Red Hills	8000 A High...	Kelseyv...	95451	0	5,207,270
BAREIS	BBGVLY	Big Valley Properties	5716 Main St	Kelseyv...	95451	5	5,183,500
BAREIS	ABIGE01	Bigelow Realty	3 Hart Lane	Mill Valley	94941	2	415,000
BAREIS	ZBRADY	Bill Brady Real Estate Broker	3329 Newpo...			0	327,500

Add >>

<< Remove

Group Name: _____

3. Name the group and click OK.

OK Cancel

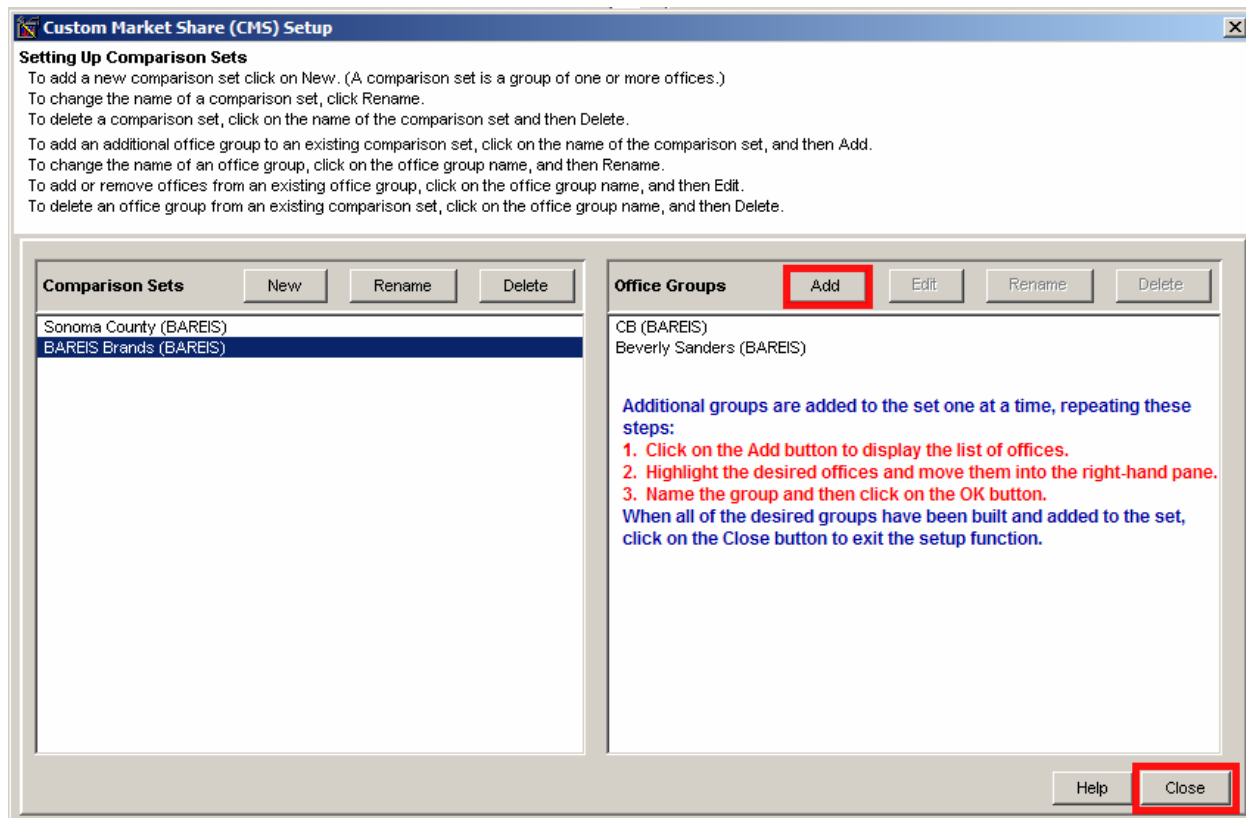
Tips:

- Sorting on the Name column allows you to group offices from the same company and/or brand easily.
- Standard Windows functionality is available, such as Shift-click and CTRL-click, to allow the selection of groups of offices.
- Uncommon spellings, abbreviations and typos within the MLS system can be seen easily and included in your group, e.g. C-21, C21, C/21, Century 21.
- Groups can be given meaningful and easy to remember names so that you are not limited to using the "official" MLS name, which is often long and cumbersome.

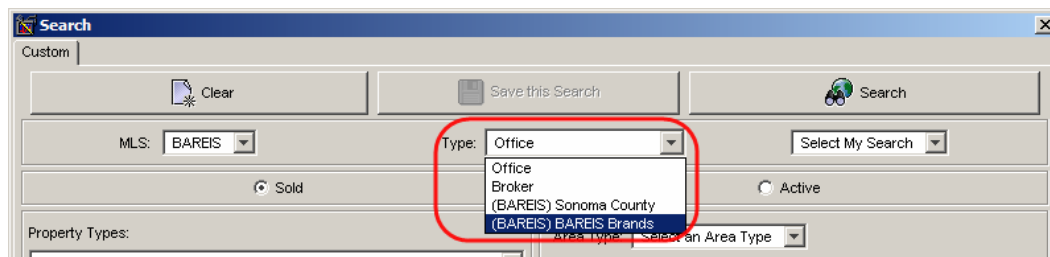
- Click the **Add** button and repeat Steps 2 and 3 above to create as many separate groups of offices as you like. When you have finished building all the desired groups and have added them to the set, click the **Close** button to save the set and exit the wizard.

There is no limit to the number of competitor sets that can be built. Create as many sets as you need to accomplish your market research objectives.

However, each set can contain no more than 20 individual groups.



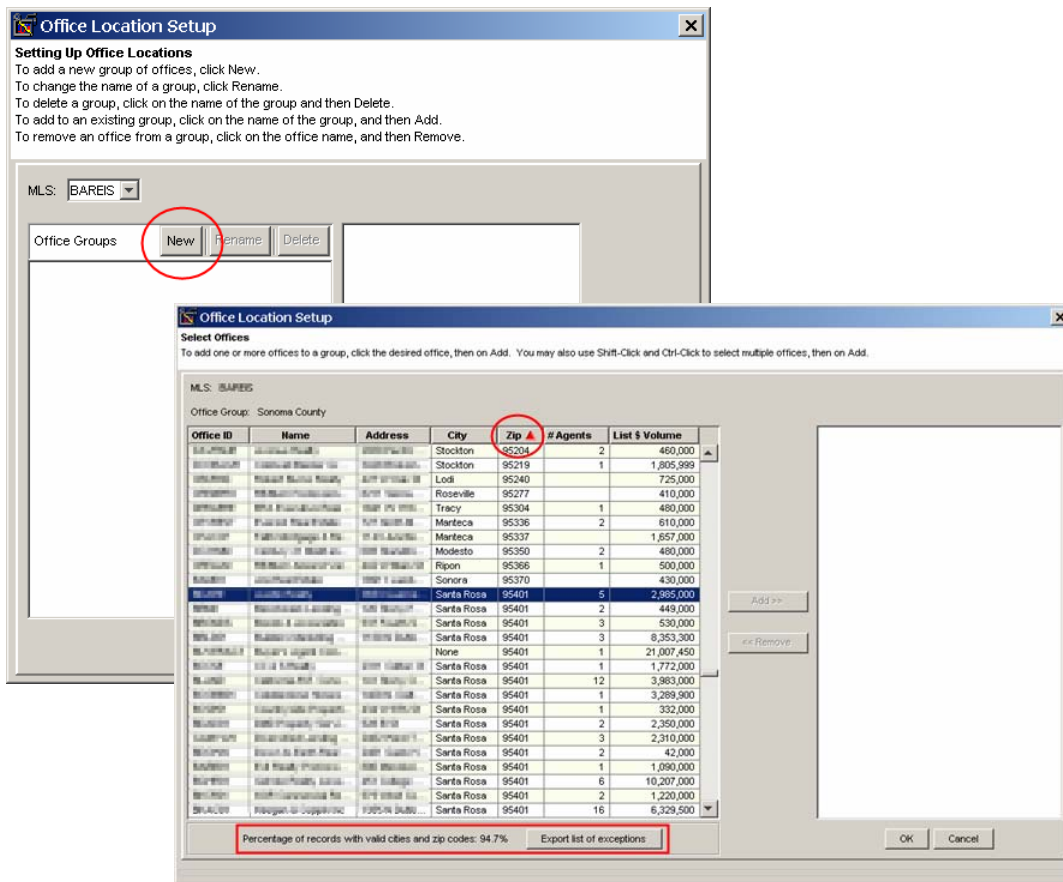
The sets will appear in the drop-down pick list of Types on the search screen:



Market Growth Office Setup (GIS)

Allows you to create groups of offices so you can see only those offices in which you have an interest (from an internal standpoint or a competitive standpoint).

- Only offices with valid cities and zip codes will be listed. The percentage of offices with valid cities and zip codes is shown below the list.
- Export a list of offices with invalid cities or zip codes so you can follow up with appropriate individuals for corrections.
- Create geographical groupings (sort on the City or Zip columns), or groups of competitors (sort on the Office ID or Name columns).



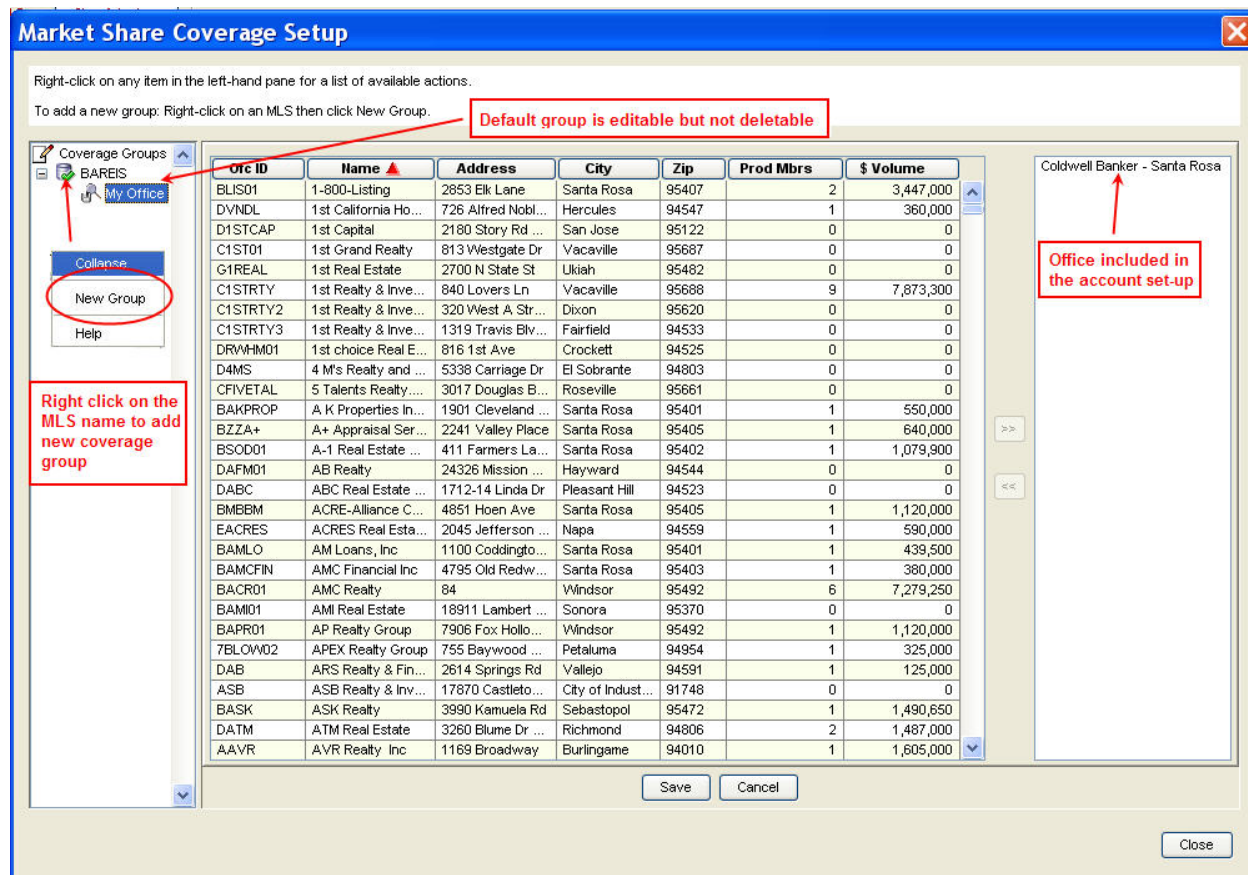
Market Share Coverage Setup

Allows the user to create market service area groups of their office(s) or prime competitors' to identify real-time comparison tracking.

Select Market Share Coverage Setup on the Preferences menu.



A default coverage group will be created the first time a user accesses the Market Share Coverage search tab or the coverage group set-up. The default coverage group will include your office. You may add offices to this group (for instance, you may wish to add a satellite office), but this group may not be deleted.

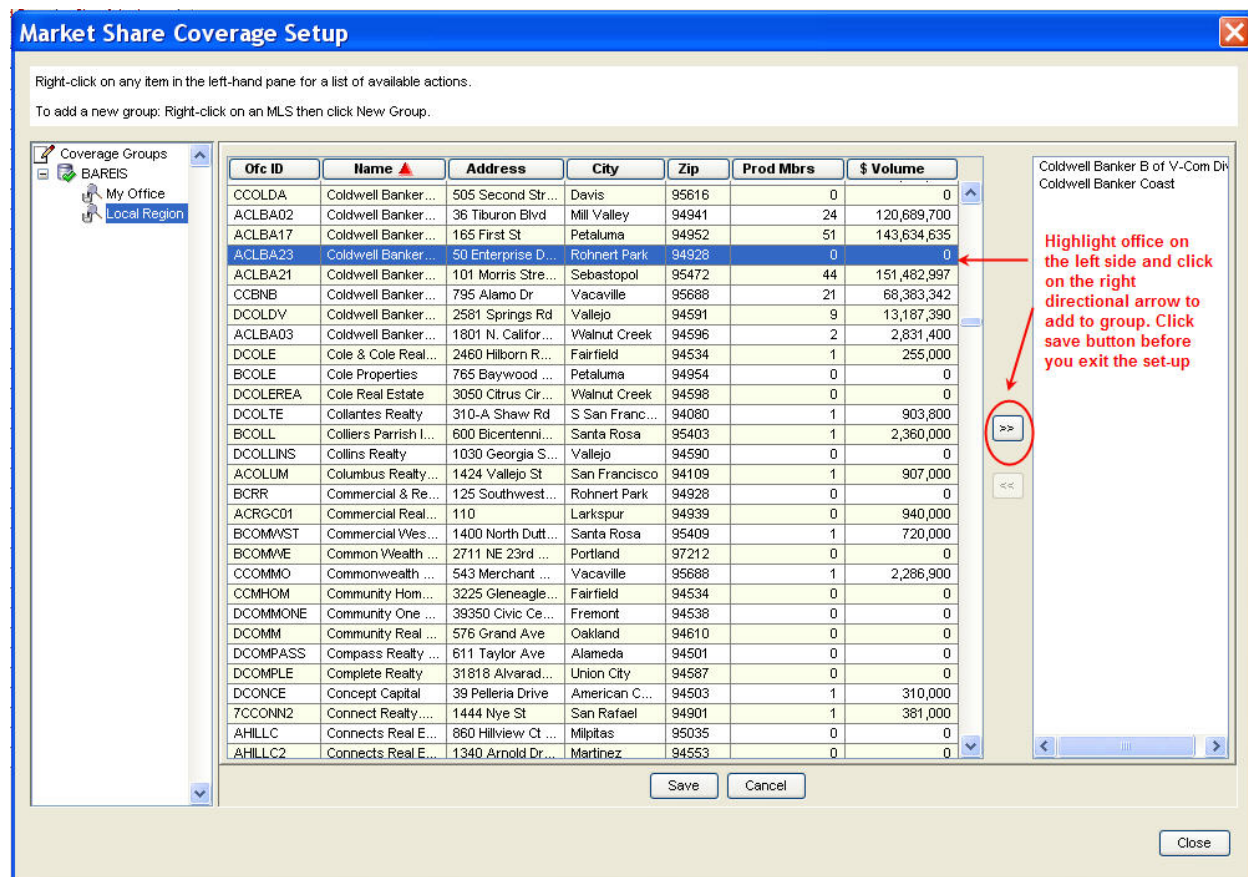
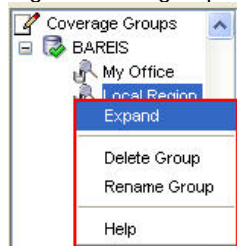


To add and edit groups:

Right click on MLS name and assign a name to add a new group



Right click on group name to delete or rename group.



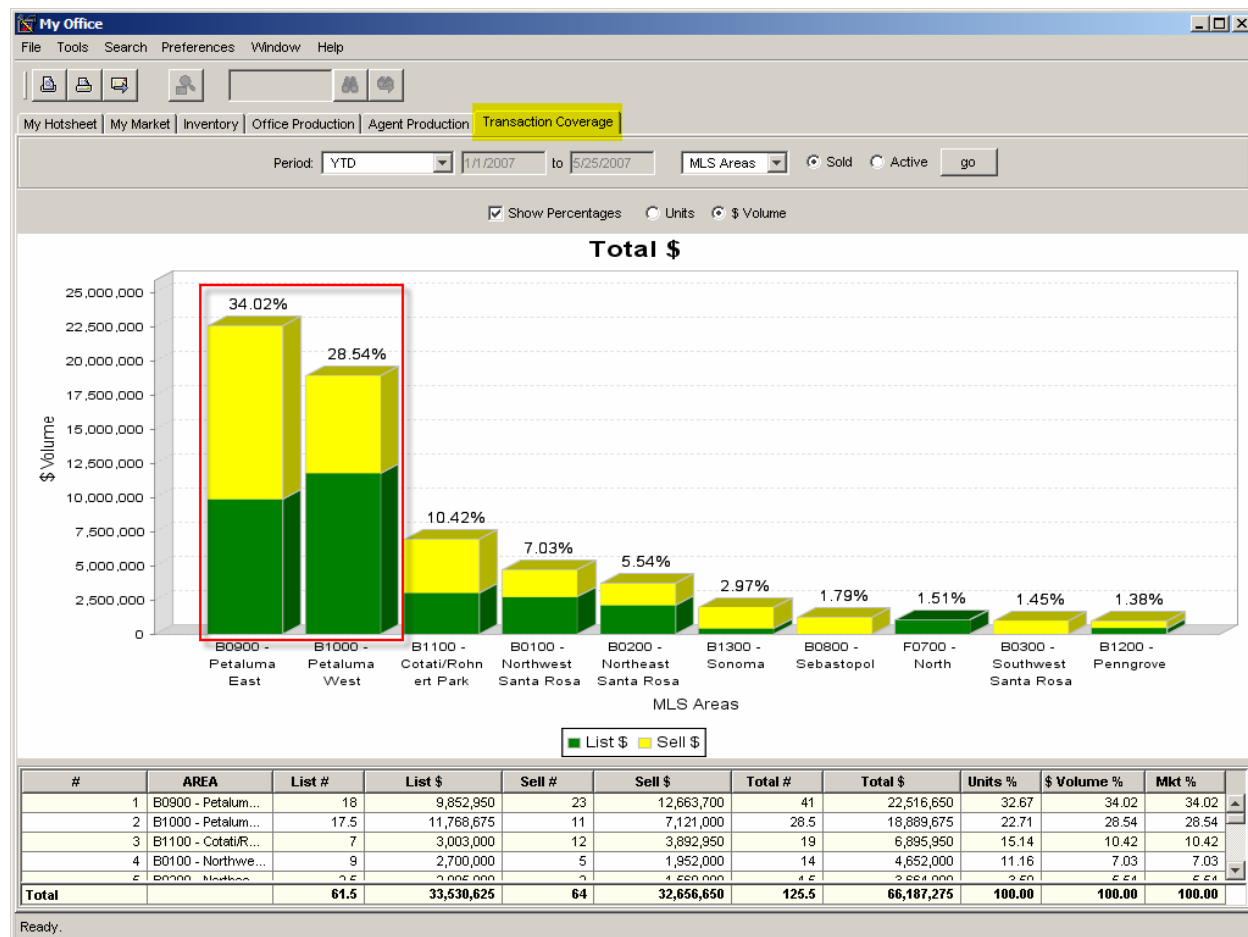
- Move an office from the list on the left into the selection window on the right.
Tip: Click on the Name column header to sort the offices alphabetically, then select groups of offices from the same company.
- Click on the Save button to add the selected offices to the group.
- Click on the Close button to exit set-up

My Market Setup Wizard

Allows the user to define a market service area and identify prime competitors for real-time comparison tracking.

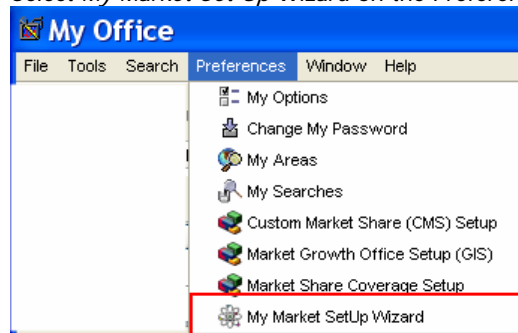
Step 1

Identify your office's service area by type by reviewing the information on the My Office – Transaction Coverage tab.



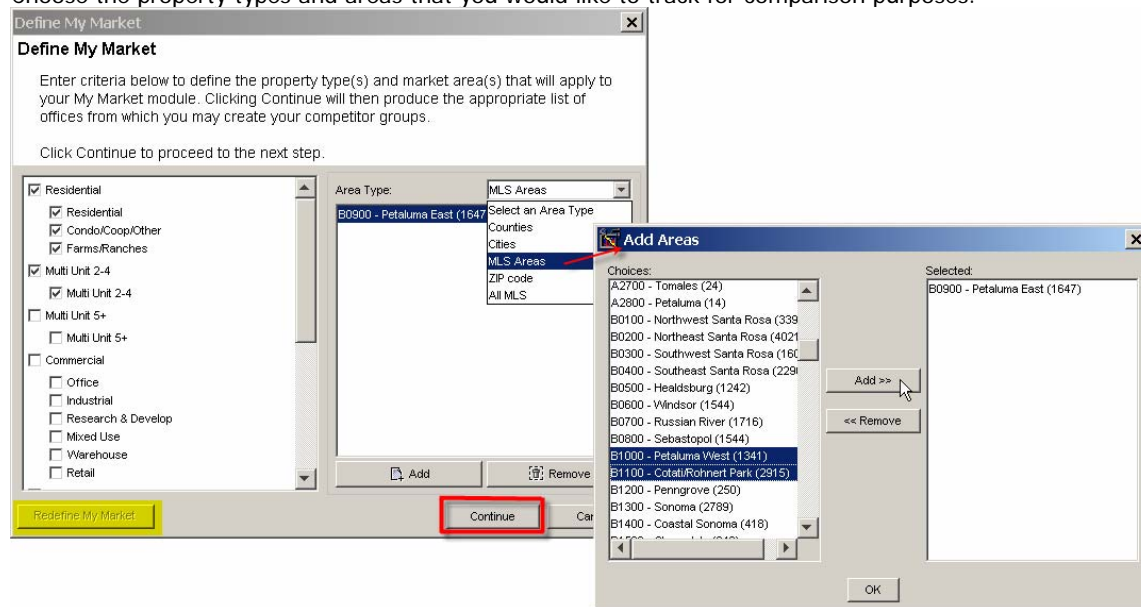
Step 2

Select *My Market Set Up Wizard* on the Preferences menu.



Step 3

Choose the property types and areas that you would like to track for comparison purposes.

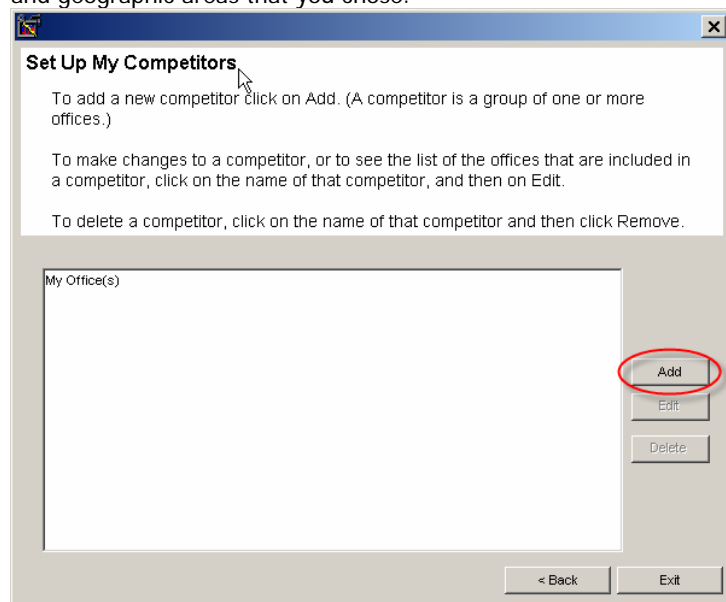


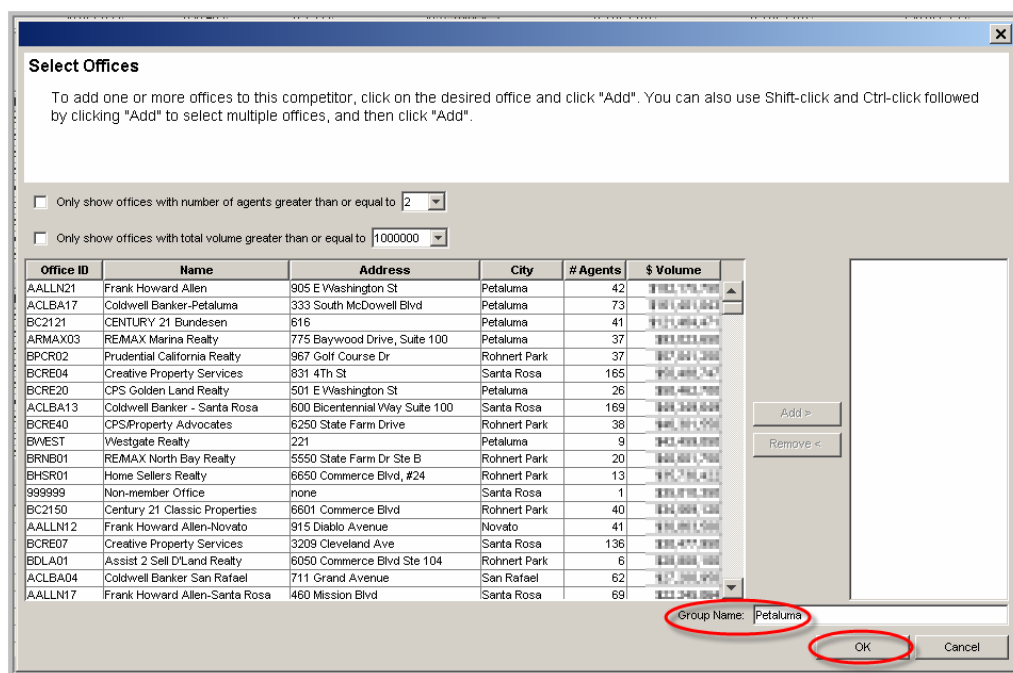
Click **Continue** after your property type and area selections have been made.

Note: You may change your property type or geographic areas as conditions warrant ("Redefine My Market"), but be aware that this will require going through the entire setup process again.

Step 4

Choose the competitor offices that you would like to compare to your office (My Office). Begin by clicking **Add**, which will present a list of offices (in descending order by dollar volume production) relative to the property types and geographic areas that you chose.

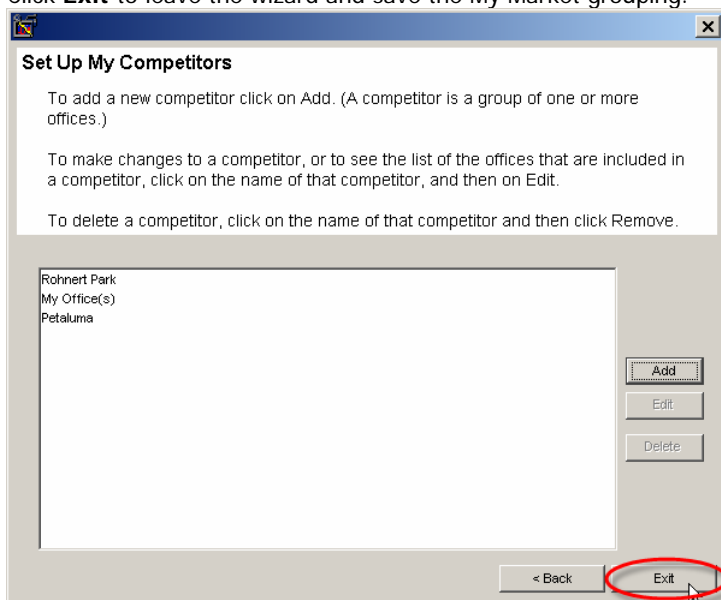




- Move an office from the list on the left into the selection window on the right.
Tip: Click on the Name column header to sort the offices alphabetically, then select groups of offices from the same company.
- Give the office grouping a meaningful and easy-to-remember name.
- Click **OK** and repeat the process until all the relevant competitor groups have been built.

Step 5

Click **Exit** to leave the wizard and save the My Market grouping.



Now, whenever you use the My Office tool, BrokerMetrics® will automatically use the Market Area you defined to compare your office's performance with your pre-selected competitors.

My Office

The tool that allows the office manager to view his/her operations in real time.

There are six tabs in the My Office tool:

- My Hotsheet
- My Market
- Inventory
- Office Production
- Agent Production
- Transaction Coverage

My Hotsheet

Three at-a-glance views of current office operating information:

- **Inventory**
Current Active inventory and under contract listings (Accepted Offers)
- **Goals** (performance vs. plan)
Picklists allow for different production views (Listings, Closings, GCI) and time frames (YTD, QTD, MTD)
- **Recent Listing Activity** (New Listings, Accepted Offers, Closings and Expired Listings)
1-31 days back

The screenshot displays the 'My Office' application window. The 'Inventory' tab is active, showing a summary of active and accepted offers. The 'Goals' section shows performance metrics for 2006. The 'Recent Listing Activity' section is expanded, showing 'New Listings', 'Accepted Offers (List Side Only)', 'Closings', and 'Expired Listings'.

	Total #	Total \$	Avg \$	\$ / Agent	Avg DOM
Active	73.5	53,919,341	733,596	641,897	90
Accepted Offers	20.5	14,184,050	691,905	168,858	46

	2006	Year Goal	YTD Target	YTD Actual	YTD %
Total #	290	287	113	108.5	-3%
Total \$	179,708,616	179,593,591	70,853,362	75,725,790	6%

Changes from 7 Day(s) back

New Listings

Address	Type	Price	SOC	Stat...	BD	BA	SQFT	Yr Blt	List Agent	Co-List	List Date	Expiration
371 Circulo San Marcus	MOBL	119,950	3%	A	2	2	1,300	1977	Cresci, S		05-21-2007	
471 Acadia	RESI	675,000	2.5	A	5	3	2,145	1994	King, P		05-21-2007	
10 Barranca	RESI	799,000	2.5%	A	4	2	2,188	1965	Bondoc, N		05-20-2007	
850 Holly	RESI	719,000	2.5	A	4	3	2,202	1978	Harwood, S		05-18-2007	

Accepted Offers (List Side Only)

Address	Type	Price	SOC	Stat...	BD	BA	SQFT	Yr Blt	List Agent	Co-List	List Date	Contract
916 Western	RESI	599,950	2.5	C	4	2	2,100	1923	Levy, R		11-22-2006	05-23-2007
5 Agatha	RESI	869,900	3.5	P	4	3	2,432	1973	Andresen, N		03-06-2007	04-30-2007
516 Walnut	RESI	759,000	2.5	P	4	2.1	1,949	1905	King, P		02-09-2007	04-25-2007
64 Fairways	COND	570,000	3	P	2	2	1,126	1970	Kirkaldie, L		09-22-2006	04-22-2007

Closings

Address	Type	Sale Price	SOC	GCI	List Agent	Sell Agent	Sold Date	DOM
1614 Annetta	RESI	527,000	2.5	6,588		Ramirez, R	05-22-2007	69
541 Greenwich	RESI	719,500	2.5	8,994	King, P		05-22-2007	89
614 Brown	RESI	459,000	2.5	5,738		Exilus, D	05-21-2007	6
1245 Andrea	RESI	560,000	2.5%	7,000	Bondoc, N		05-18-2007	153
408 Corte Pintado	MOBL	60,000	3	900		Peterson, R	05-18-2007	149

Expired Listings

Address	Type	Org. Price	#PR	Price	SOC	Status	BD	BA	List Agent	Co-List	Off-Mkt	DOM
296 Thompson	RESI	900,000	3	800,000	2.5	W	3	2	Andresen, N		05-21-2007	256

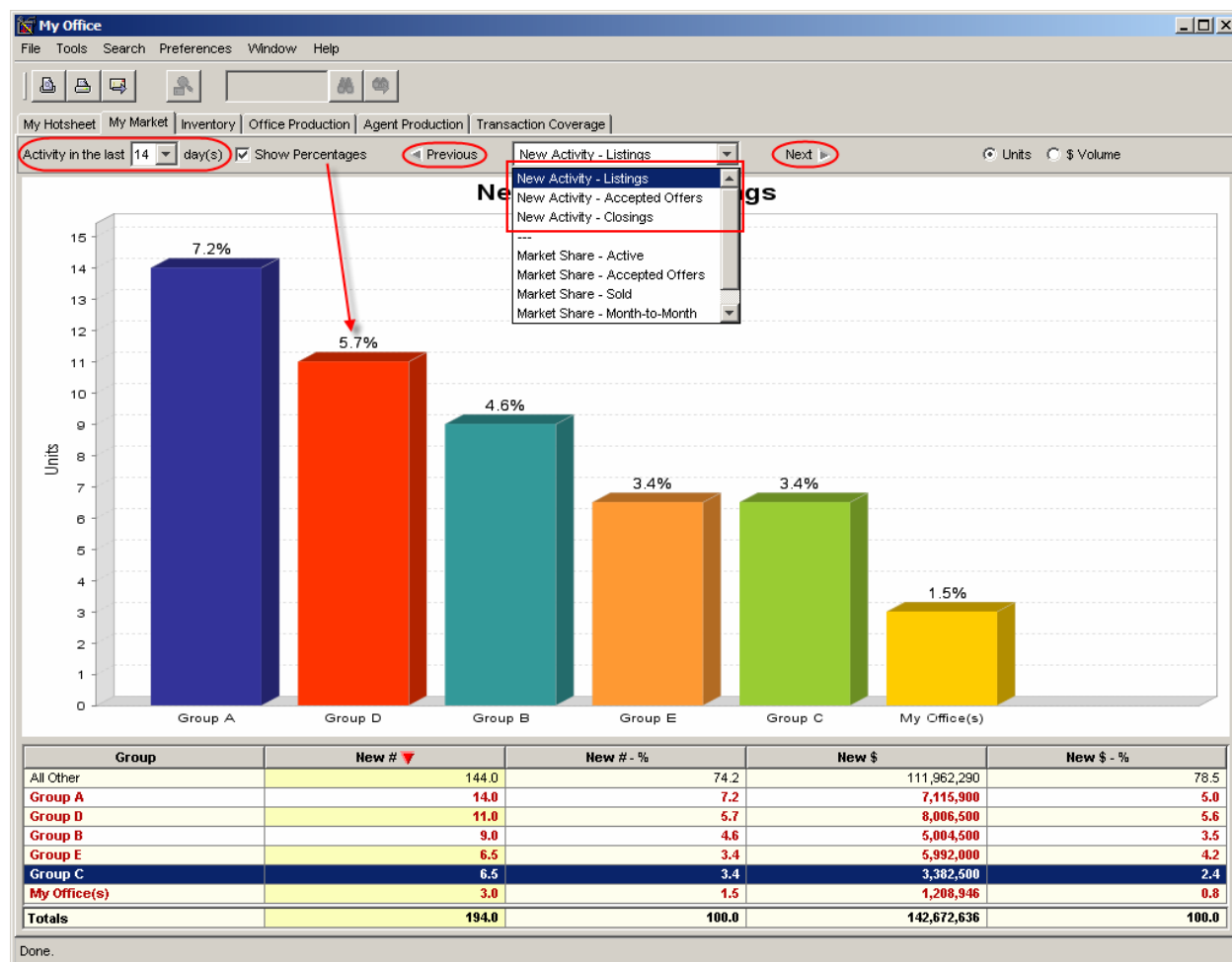
Ready.

My Market

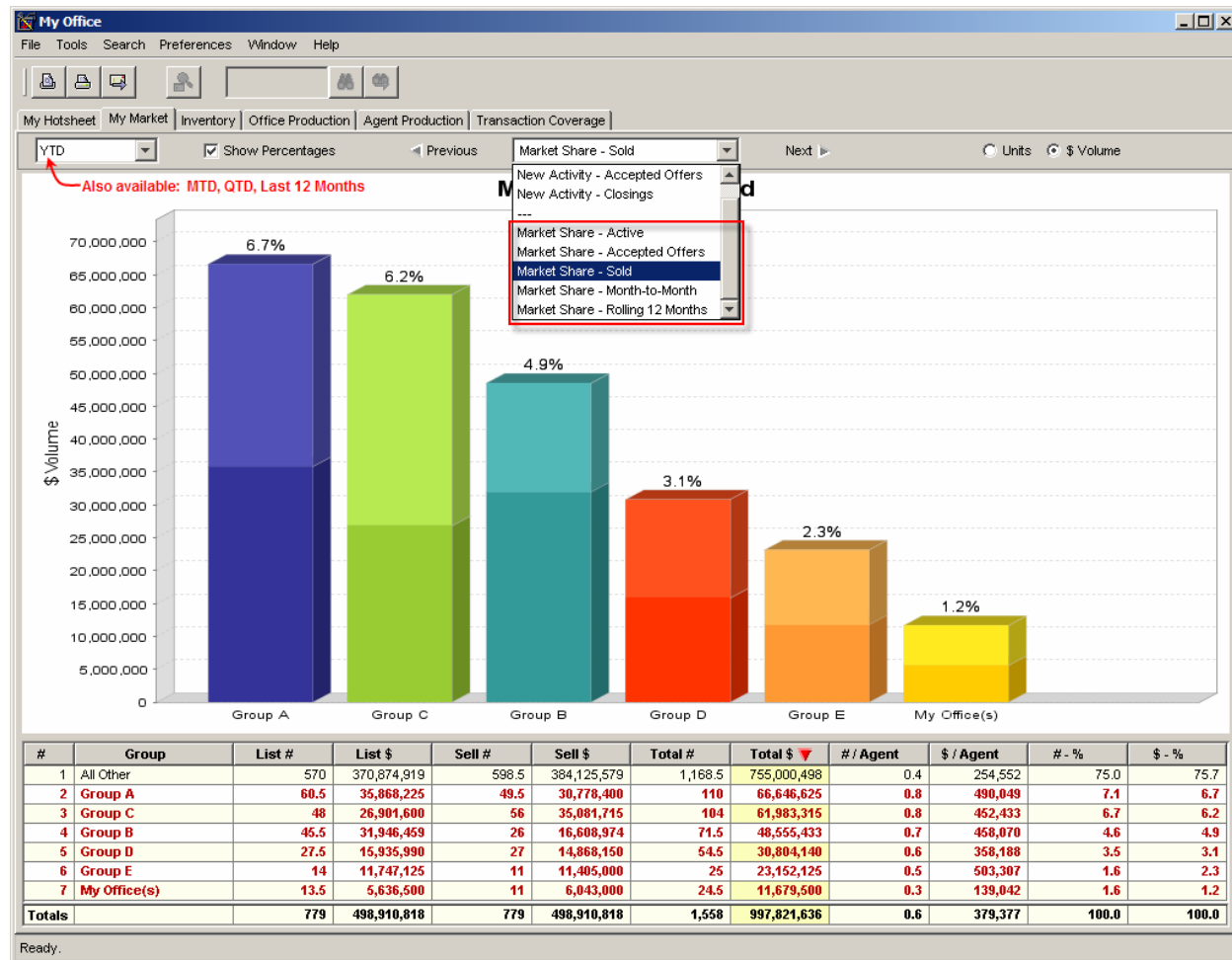
Provides the office manager with real-time comparison view of how their office is performing relative to the competition with any prescribed geographical area(s).

- A one-time setup is required (see the My Market Setup Wizard)
- Select the desired view directly from the picklist, or navigate through the views by clicking the **Next ▶** or **◀ Previous** buttons on either side of the picklist.
- The underlying record information is available via a right mouse-click.

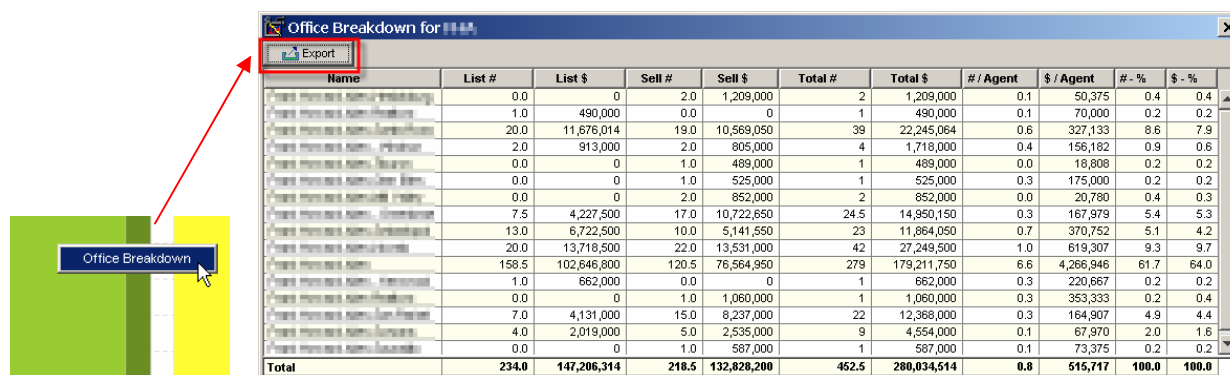
Three **New Activity** views (1-31 days back):



Five **Market Share** views:



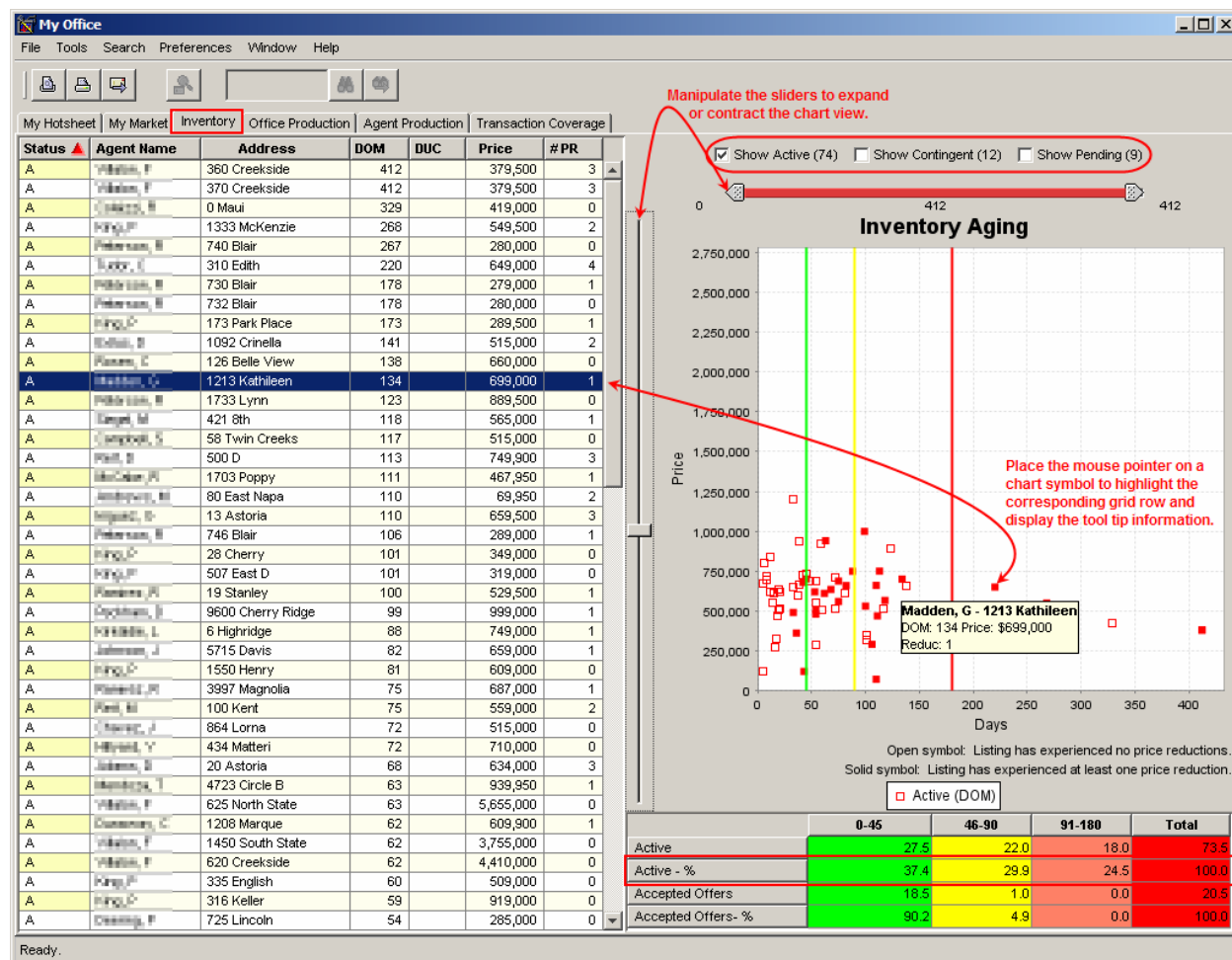
Right-click on the chart or on a row in the grid to view and export the underlying information:



Inventory

Provides an at-a-glance view of current listings on a \$ Volume or # Units basis. This visual inventory management tool allows office managers to monitor active listings from a DOM aging perspective.

- The horizontal axis depicts Days on Market (DOM).
- The vertical axis depicts Price.
- The slider controls allow the user to manipulate the chart area.
- Solid-color symbols (▲●■) represent listings that have experienced one or more price reductions.
- The mouse pointer placed on a chart symbol invokes a tool tip that displays agent name, property address, DOM, price, and the number of price reductions.
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse-click function on a chart symbol.
- The table below the chart contains important DOM information: 0 – 45 days is the optimum range to find active inventory.
 - The Active % line in this table indicates the percentage of listings that are in every DOM category. Looking at these figures periodically will help the office manager monitor the strategic positioning of the office's inventory.
 - When Contingent or Pending properties are invoked via the checkboxes, the relevant periods change to Days Under Contract (DUC).



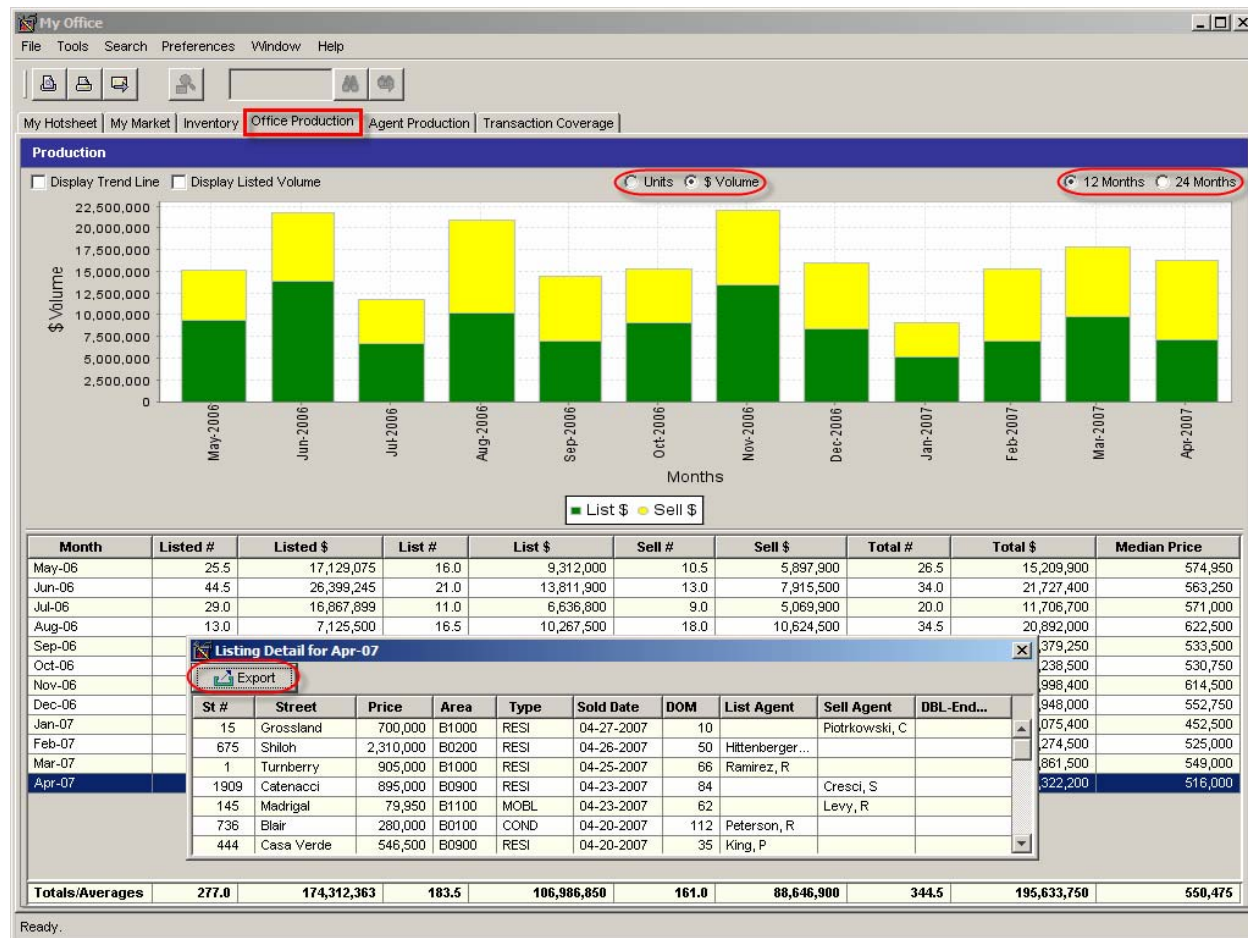
Three vertical lines on the chart depict critical DOM milestones for reference purposes:

1. The **green** line represents the 45-day DOM progression point. Any listing that goes by this key date could have been priced with more precision and should be monitored from a price-reduction perspective. An open symbol (□) indicates the sellers are “staying put,” while a solid symbol (■) indicates they are trying to “find” the market with a price reduction.
2. The **yellow** line represents the 90-day DOM progression point. Any listing that goes by this key date could have been priced with much more precision and should be monitored from a price-reduction perspective. An open symbol (□) indicates the sellers are “staying put,” while a solid symbol (■) indicates they are trying to “find” the market with a price reduction.
3. The **red** line represents the 180-day DOM progression point. Any listing that goes by this key date could have been priced with significantly more precision and should be monitored from a price-reduction perspective. An open symbol (□) indicates the sellers are “staying put,” while a solid symbol (■) indicates they are trying to “find” the market with a price reduction.

Office Production

Provides a visual depiction of the office's closed production (list + sell) figures for the previous 12 or 24 months.

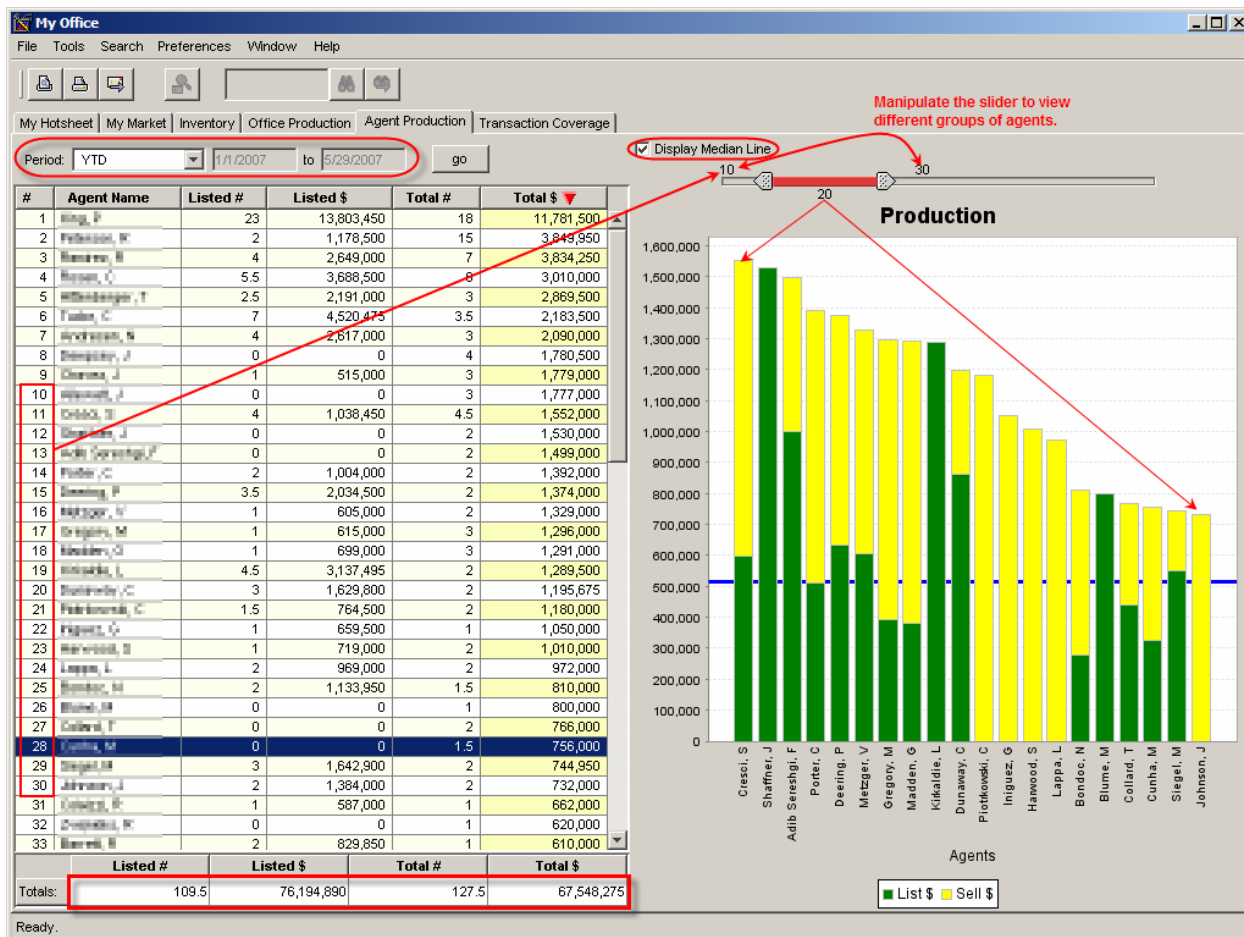
- Two views: # Units and \$ Volume
- The stacked bars on the chart represent total production; the green section represents the list-side transactions, and the yellow section represents the sell-side transactions.
- Trend line shows directional movement from growth and seasonality perspectives.
- The underlying Listing Detail for any given month can be accessed and then exported via the right-click functionality.



Agent Production

Provides the office manager with a view of individual agent production over any desired time period.

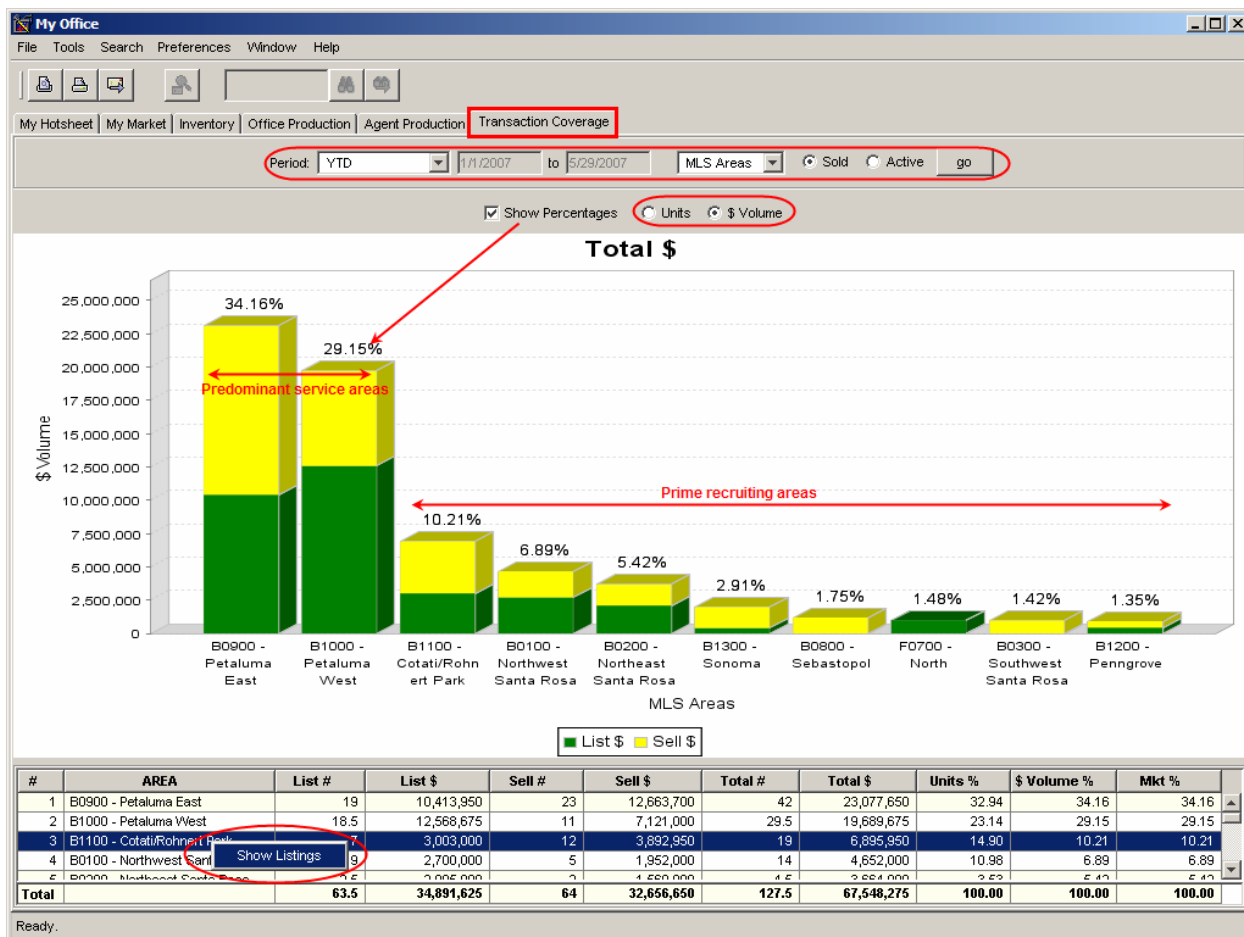
- The stacked bars on the chart represent total production; the green section represents the list-side transactions, and the yellow section represents the sell-side transactions.
- The median line represents the median total \$ volume production for all agents.
- Manipulate the slider controls to view different groups of agents on the chart.



Transaction Coverage

Allows the office manager to pinpoint the most productive geographies (MLS areas, zip codes, cities, etc.) that are serviced by the office. Armed with this information, the office manager can set up My Market in an intelligent and meaningful way. In addition, Transaction Coverage indicates where to perform recruiting activities – areas of current business that could be expanded with targeted recruiting efforts.

- # Units or \$ Volume displays.
- Sold (closed transaction) or Active listing coverage can be displayed.
- Any desired time frame may be used.
- The underlying records may be accessed via the right-click function.



Agent Analysis

Provides the office manager a tool to analyze the office's agents using a wide variety of efficiency and performance metrics.

Overview

Provides a spreadsheet type of display of listings taken, closed transactions and various efficiency metrics over the last complete 12 months.

- Underlying record information is accessed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.
- The red column header arrow and darker column row color indicate the column upon which the rows have been sorted. Click on another column header to resort the grid. Use this functionality to rank agents by any desired metric.

#	Agent Name	Inv #	Inv \$	Total #	Total \$	ROR	DCC	SOC%	AMT	C/L	T/L
1	John Doe	15	9,374,950	55	34,227,400	19.8	978	2.65	8	75	1.0
2	John Doe	3.5	2,773,500	17.5	11,048,050	15.0	316	2.75	13	94	1.1
3	John Doe	3	1,817,000	14	9,468,000	13.9	271	2.51	14	71	1.0
4	John Doe	3	1,744,000	16	9,157,750	13.6	262	2.66	13	62	1.0
5	John Doe	1	515,000	13	7,962,450	12.3	228	2.52	15	56	2.9
6	John Doe	1	799,500	12	6,532,300	10.2	187	2.53	12	140	2.4
7	John Doe	12.5	238,950	12.5	5,545,400	8.1	158	2.69	13	65	1.2
8	John Doe	8	1,948,995	8	4,977,000	6.5	142	2.74	12	57	1.1
9	John Doe	10	469,000	10	4,808,000	6.0	137	2.66	13	33	3.3
10	John Doe	8	1,629,800	8	4,555,400	5.1	130	2.70	15	44	0.9
11	John Doe	18	2,017,500	18	4,537,450	5.0	130	2.69	15	71	1.1
12	John Doe	8	575,000	8	4,430,500	4.6	127	2.77	14	83	1.3
13	John Doe	0.5	253,500	4	4,377,500	4.4	125	2.70	14	56	0.9
14	John Doe	1	515,000	6	4,268,000	4.0	122	2.84	16	80	1.2
15	John Doe	7.5	4,836,975	7	3,977,500	2.6	114	2.57	16	14	0.6
16	John Doe	1	615,000	8	3,727,000	1.3	107	2.69	20	100	2.0
17	John Doe	1	719,000	5	3,447,500	-0.3	99	2.50	5	100	5.0
18	John Doe	1	899,000	5	3,445,000	-0.3	98	2.63	11	150	2.5
19	John Doe	1	999,000	4	3,187,000	-2.2	91	2.50	15	150	2.0
20	John Doe	1	870,000	4	3,063,000	-3.1	88	2.50	13	40	0.8
21	John Doe	1.5	764,500	6	3,062,000	-3.1	88	2.58	8	67	4.0
22	John Doe	1	585,000	6	3,056,500	-3.2	87	2.65	13	0	6.0
23	John Doe	2	829,850	6	3,015,500	-3.5	86	2.60	6	40	1.2
24	John Doe	1	654,450	5	2,915,850	-4.4	83	2.50	15	100	1.7
25	John Doe	1	659,500	3	2,840,000	-5.1	81	2.68	12	50	1.5
26	John Doe	1	654,450	5	2,791,200	-5.6	80	2.46	16	114	1.4
27	John Doe	1	508,925	5	2,697,450	-6.5	77	2.55	27	78	1.1
28	John Doe	1	599,950	6.5	2,404,450	-10.0	69	2.61	26	300	6.5
29	John Doe	1	530,000	5	2,381,500	-10.3	68	2.83	35	200	5.0
30	John Doe	1	510,000	5	2,350,000	-10.8	67	2.66	4	100	5.0
31	John Doe	1	699,000	4	2,166,000	-13.5	62	2.58	18	100	2.0
32	John Doe	1	508,925	3.5	2,161,950	-13.6	62	2.56	31	71	1.0
33	John Doe	2	969,000	4	2,149,000	-13.8	61	2.78	6	0	2.0
34	John Doe	1	829,000	3	2,117,000	-14.4	61	2.50	17	100	1.5
35	John Doe	1	579,000	3.5	2,098,500	-14.7	60	2.65	15	100	1.0
36	John Doe	1	819,000	2	2,049,000	-15.6	59	2.50	25	0	2.0
37	John Doe	1	649,000	3	2,002,500	-16.4	57	2.50	19	100	1.0
38	John Doe	2	1,203,000	4	1,947,950	-17.5	56	2.55	14	50	1.0

The efficiency metrics displayed on the grid are the following:

Return on Revenue (ROR)

Percentage of GCI revenue that is "Net \$" to the company after all commissions and expenses have been paid. It is the most direct measure of the overall operational efficiency

Desk Cost Coverage (DCC)

Measures gross profit vs. gross expense as a percentage.

Selling Office Commission (SOC)

The average commission offered to cooperating brokers. The list-side commission is then inferred by local custom,

e.g. if 6% commissions are the market custom and the cooperating broker is being offered 3%, then the listing broker is probably getting 3% as well.

Average Marketing Time (AMT)

Measures the average number of weeks needed to get listings under contract. It is an indirect measure of your agents' ability to price listings well in the competitive marketplace.

Closed-to-List Ratio (C/L)

Measures the number of listings that successfully close relative to the number that were taken (over the last 12 complete months) on a percentage basis. This is a direct measure of your agents' ability to price listings well in the competitive marketplace.

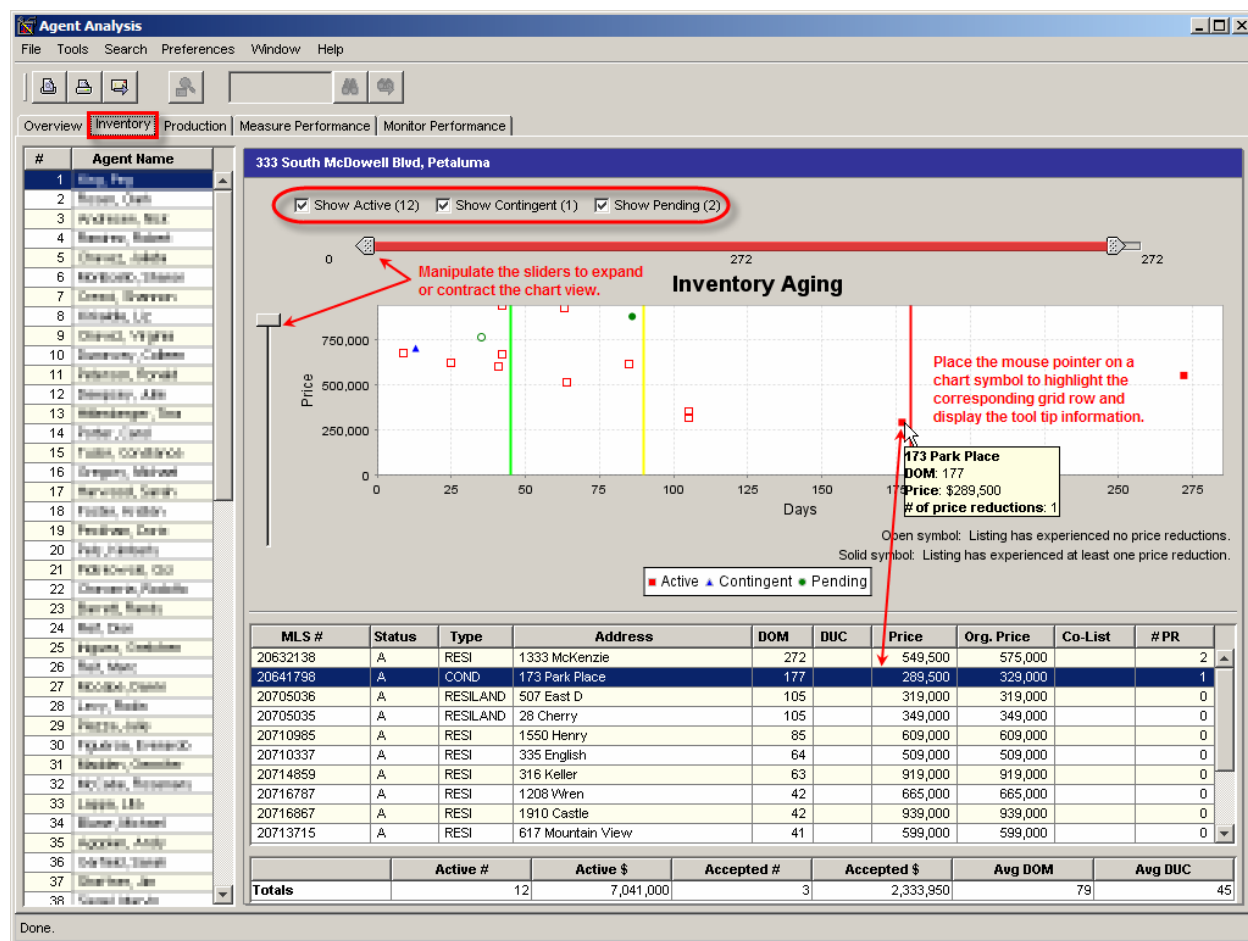
Transactions-to-List Ratio (T/L)

Measures the total number of closed transactions versus the number of listings that were taken (over the last 12 complete months) on a percentage basis.

Inventory

Provides an inventory management tool that allows office managers to monitor active listings from a DOM aging perspective.

- Highlighted row is the agent of focus.
- The horizontal axis depicts Days on Market (DOM).
- The vertical axis depicts Price.
- The slider controls allow the user to manipulate the chart area.
- Solid-color symbols (▲●■) represent listings that have experienced one or more price reductions.
- The mouse pointer placed on a chart symbol invokes a tool tip that displays agent name, property address, DOM, price, and the number of price reductions.
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse-click function on a chart symbol.



Three vertical lines on the chart depict critical DOM milestones for reference purposes:

1. The **green** line represents the 45-day DOM progression point. Any listing that goes by this key date could have been priced with more precision and should be monitored from a price-reduction perspective. An open symbol (□) indicates the sellers are “staying put,” while a solid symbol (■) indicates they are trying to “find” the market with a price reduction.
2. The **yellow** line represents the 90-day DOM progression point. Any listing that goes by this key date could have been priced with much more precision and should be monitored from a price-reduction perspective.

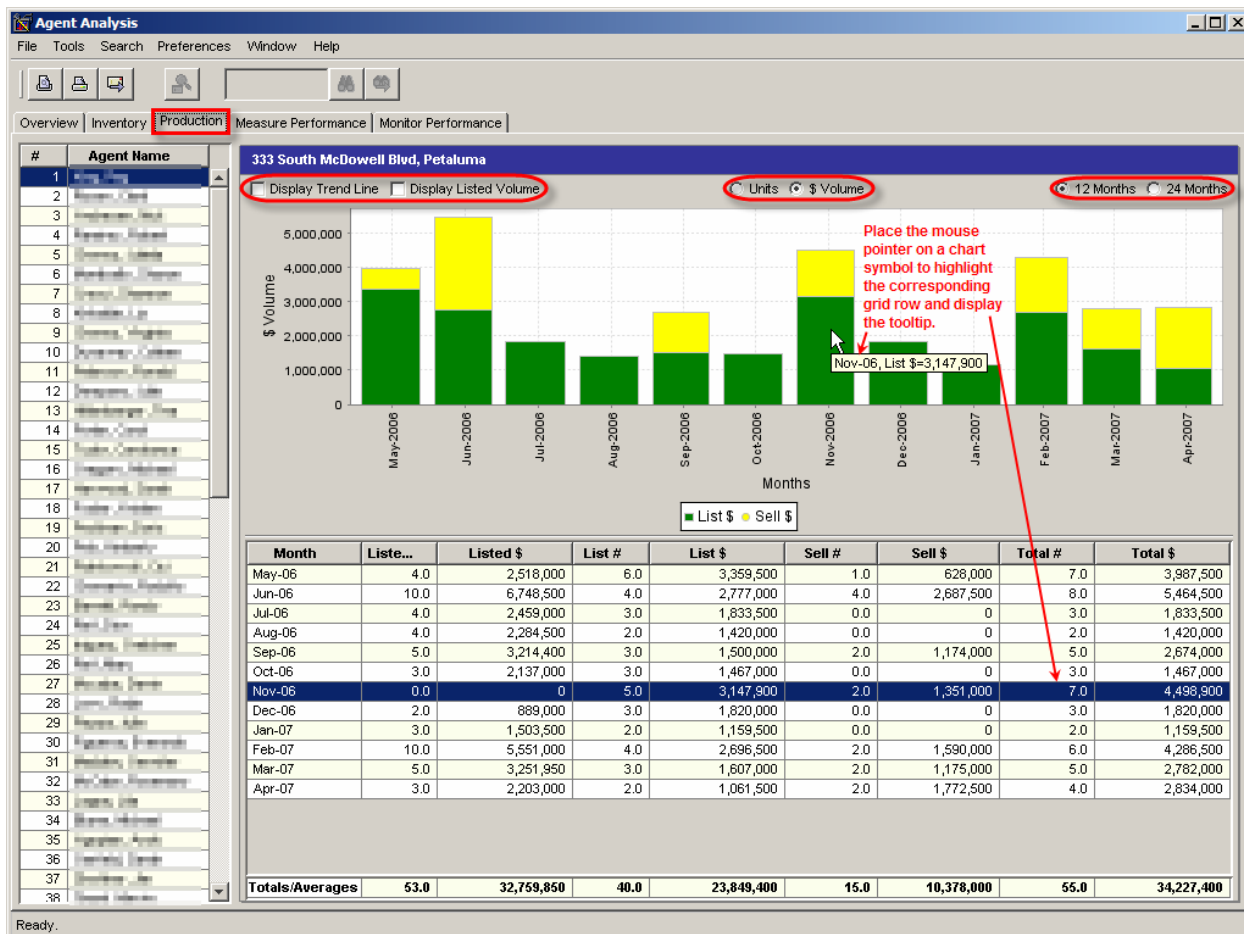
An open symbol (□) indicates the sellers are “staying put,” while a solid symbol (■) indicates they are trying to “find” the market with a price reduction.

3. The red line represents the 180-day DOM progression point. Any listing that goes by this key date could have been priced with significantly more precision and should be monitored from a price-reduction perspective. An open symbol (□) indicates the sellers are “staying put,” while a solid symbol (■) indicates they are trying to “find” the market with a price reduction.

Production

Provides the office manager with a view of each agent's closed production (list + sell) for the last 12 or 24 months.

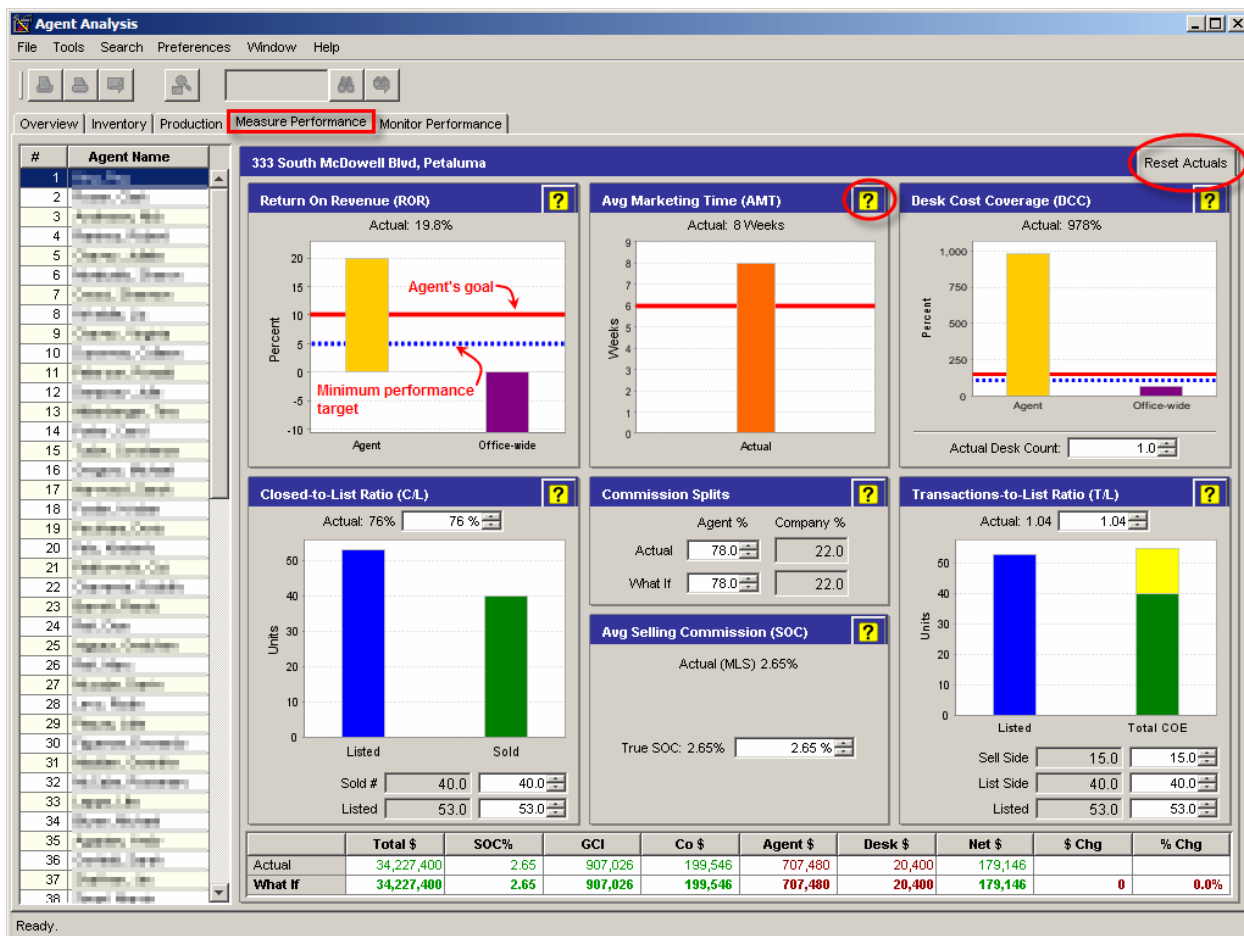
- Two views: # Units and \$ Volume
- The stacked bars on the chart represent total production; the **green** section represents the list-side transactions, and the **yellow** section represents the sell-side transactions.
- Trend line shows directional movement from growth and seasonality perspectives.
- The underlying Listing Detail for any given month can be accessed and then exported via the right-click functionality.



Measure Performance

Provides a display of each agent's performance and efficiency metrics versus the office's stated goals and objectives. The Last Twelve Months time period ameliorates any seasonal factors..

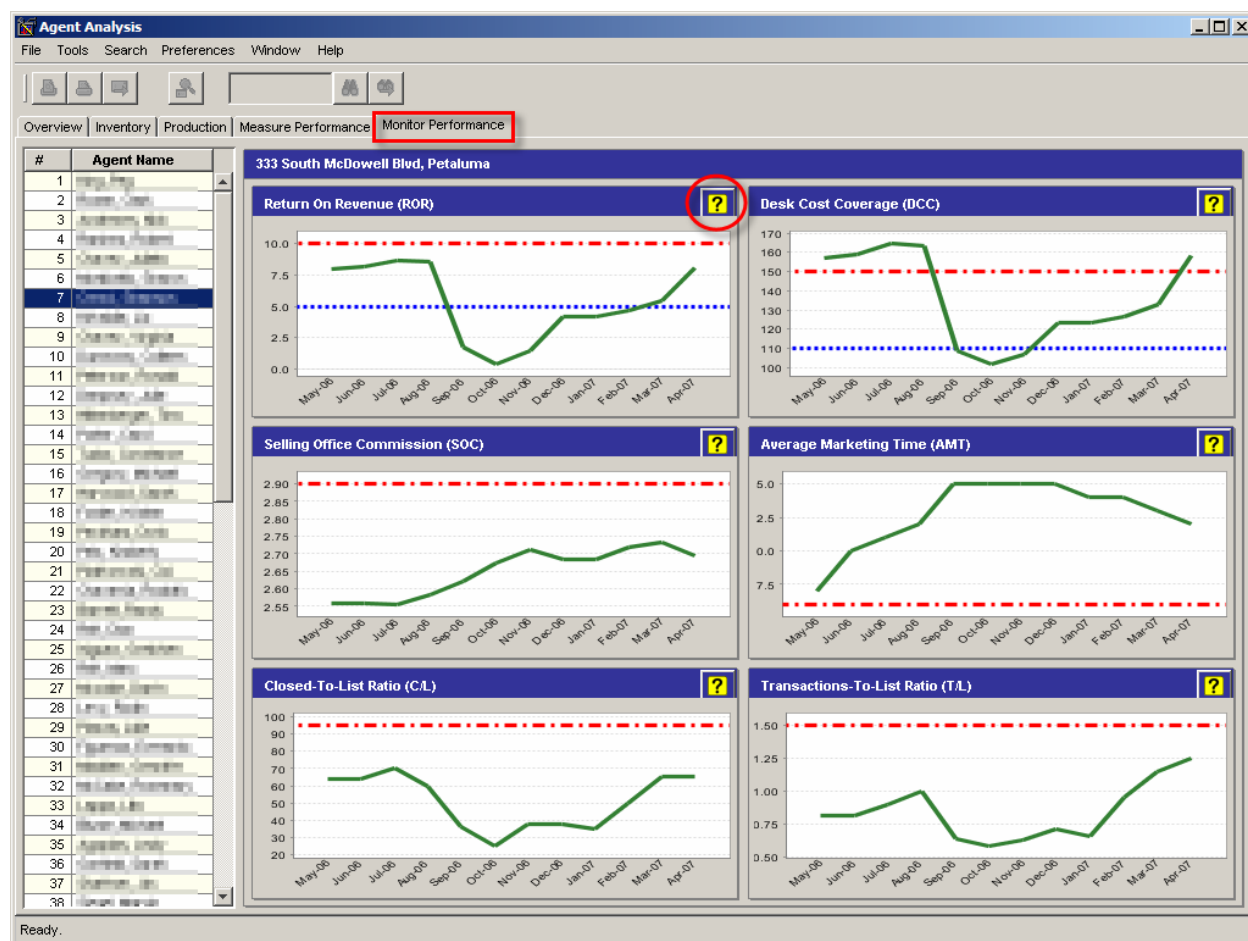
- Company goals are displayed using red lines; minimum performance targets are dotted blue lines.
- Highlighted row indicates agent being viewed.
- "What If?" spinners provide managing and coaching tools.
 - Which agents exceed the goals?
 - Which agents need to improve?
- The default commission split in an ASM model will simply be the retained dollar percent as set up in Options (Financial tab).



Monitor Performance

The agent's efficiency metrics are displayed on a twelve-month moving average line chart so the manager can easily determine if the agent is meeting or moving towards the company goals over time.

- Time frame is the last complete 12 months.
- Each data point is a 12-month average.
- The charts reflect the 12-month moving average of the various performance metrics.
- Goals are displayed using red lines; minimum performance targets are dotted blue.
- Highlighted row indicates the agent being viewed. Clicking from row to row provides a quick snapshot of each agent's performance.
- Click the **i** button for an explanation of the metric.



Recruiting

- Provides 3 easy ways to search for and analyze potential recruits:
 - Agents' market share
 - By office
 - By agent name
- Performs agent level market share calculations.
- Minimum production criteria can be set using \$ volume and/or # units.
- Recruits can be analyzed from several perspectives: inventory, production, and operational performance.
- Any recruit's last 12 months of MLS production can be viewed as if they had been a member of your office. Thus, you can determine (before any effort is expended) what bringing them to your office would mean financially!

Recruiting Search Screen

Agent Market Share

Search

Agent Market Share | Office Search | Agent Name Search

Clear Save this Search Search

To optimize system performance, the maximum number of records that will be returned is 2,000.

MLS: BAREIS Select My Search

Property Types:

- ☒ Residential
 - ☒ Residential
 - ☒ Condo/Coop/Other
 - ☒ Farms/Ranches
- ☐ Mobile/Floating Home
 - ☐ Mobile Home
 - ☐ Floating Home
- ☐ Lots & Land
 - ☐ Residential
 - ☐ Commercial
 - ☐ Acreage

MLS-specific Property Types

Area Type: MLS Areas

Area	MLS Areas	Count
B0100	Northwest Santa Rosa	6,111
B0200	Northeast Santa Rosa	7,230
B0300	Southwest Santa Rosa	3,005
B0400	Southeast Santa Rosa	4,084

MLS-specific Areas

Add Remove Save

Date Range: Last 12 Months

3/1/2006 to 2/28/2007

Price Range: ,000 to ,000

\$ Volume

Minimum \$,000 Maximum \$,000

Units

Set minimum production criteria for recruits

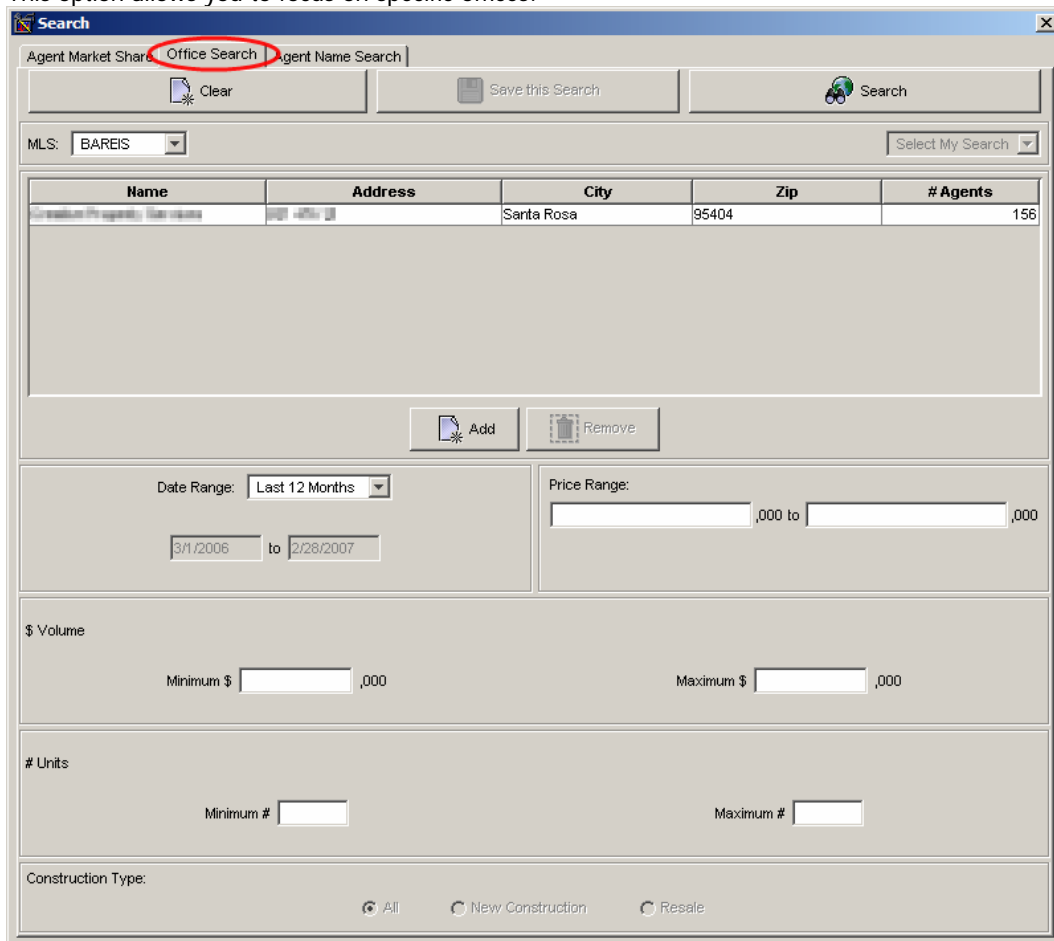
Minimum # 4 Maximum #

Construction Type:

All New Construction Resale




Office Search

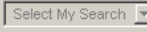
This option allows you to focus on specific offices:





Search


Agent Market Share | **Office Search** | Agent Name Search

 Clear  Save this Search  Search

MLS: BAREIS 

Name	Address	City	Zip	# Agents
Coronado Properties, Inc.	1001 - 1011 N. 1st St.	Santa Rosa	95404	156

 Add  Remove

Date Range: Last 12 Months 
3/1/2006 to 2/28/2007

Price Range: _____,000 to _____,000

\$ Volume
Minimum \$ _____,000 Maximum \$ _____,000

Units
Minimum # _____ Maximum # _____

Construction Type:
☒ All ☐ New Construction ☐ Resale

Agent Name Search

Search

Agent Market Share | Office Search | **Agent Name Search**

Clear Save this Search Search

MLS: **BAREIS** Select My Search

Agent ID	Name	Office	City	\$ Volume
10101010	Smith, Judy	Brookhaven Office - Commercial	Atlanta	24,795,700

Add Remove

Property Types:

- ☒ Residential
 - ☒ Residential
 - ☒ Condo/Coop/Other
 - ☒ Farms/Ranches
- ☒ Mobile/Floating Home
 - ☒ Mobile Home
 - ☒ Floating Home
- ☒ Lots & Land
 - ☒ Residential
 - ☒ Commercial
 - ☒ Acreage

Area Type: **All MLS**

Description	Count
-------------	-------

Add Remove Save

Date Range: **Last 12 Months**
3/1/2006 to 2/28/2007

Price Range: _____,000 to _____,000

Construction Type: ☒ All ☐ New Construction ☐ Resale

Enter all or part of a name to find the individual agents:

MLS: **BAREIS**

Last Name: **smith** ☒ Match whole word

First Name: **J** ☐ Match whole word

Agent ID: ☐ Match whole word

Find

Choices:

Agent ID	Name ▲	Office	City	\$ Volume
000001	Smith, J	San Francisco Office	San Francisco	1,090,000
000002	Smith, J	San Francisco Office	San Francisco	1,188,000
000003	Smith, J	San Francisco Office	San Francisco	24,795,700

Selected:

Agent ID	Name ▲
----------	--------

Add >>

<< Remove

OK **Cancel**

Recruiting Search Results

- All agents displayed meet the search criteria; only agents that meet the search criteria are displayed. They are ranked by their Total \$ Volume production within the criteria specified.
- Company agents are highlighted in green to indicate the company's current coverage within any given area(s).
- Company agents will not be highlighted in green when searching by your own office.
- Right-click information gives agent's company and office affiliation.
- Various forms of contact information are available depending on the data supplied by the MLS.
- Contact information is exportable to Excel for further use, e.g. mail-outs.
- Use the checkboxes on any tab to select and view only those agents on whom you wish to focus.

#	Office ID	Agent Name	List #	List \$	Sell #	Sell \$	Total #	Total \$	Avg DOM	SPOD	LTM #	LTM \$
1	1001	Smith, Paul	9.0	17,512,000	8.0	10,812,000	17.0	28,324,000	103	87.79	18.0	34,224,000
2	1002	Smith, Paul	11.0	17,370,000	7.0	9,710,000	18.0	26,880,000	21	84.18	22.5	64,916,492
3	1003	Smith, Paul	9.5	17,301,800	3.0	6,000,000	12.5	23,301,800	200	91.82	38.0	59,423,420
4	1004	Smith, Paul	19.0	13,878,450	12.0	7,750,450	31.0	21,728,900	65	88.46	37.0	24,855,650
5	1005	Smith, Paul	16.0	15,408,250	7.0	6,266,250	23.0	21,674,500	64	99.20	26.0	22,226,500
6	1006	Smith, Paul	9.0	12,995,000	5.0	6,025,000	14.0	19,020,000	139	86.34	15.0	19,740,000
7	1007	Smith, Paul	11.0	15,362,700	1.0	1,862,700	12.0	17,245,400	29	99.01	12.0	17,245,400
8	1008	Smith, Paul	9.0	6,422,000	1.0	375,000	5.0	16,797,000	178	125.91	35.5	26,272,150
9	1009	Smith, Paul	9.0	6,422,000	1.0	375,000	5.0	16,797,000	106	87.11	75.0	69,596,350
10	1010	Smith, Paul	9.0	6,422,000	1.0	375,000	5.0	16,797,000	87	95.71	6.0	16,313,000
11	1011	Smith, Paul	7.5	7,915,000	10.0	7,915,000	17.5	15,830,000	32	99.36	14.5	17,563,000
12	1012	Smith, Paul	7.5	7,915,000	10.0	7,915,000	17.5	15,830,000	65	99.92	12.0	14,893,500
13	1013	Smith, Paul	10.0	7,232,445	10.0	7,232,445	20.0	14,464,890	228	100.14	20.0	14,464,890
14	1014	Smith, Paul	6.0	8,365,000	3.0	5,390,000	9.0	13,755,000	56	98.47	9.0	13,755,000
15	1015	Smith, Paul	9.0	5,522,000	5.0	3,994,900	14.0	13,516,900	70	96.27	27.0	20,022,000
16	1016	Smith, Paul	6.0	5,234,500	7.0	7,669,000	13.0	12,903,500	51	96.05	17.0	16,507,500
17	1017	Smith, Paul	11.0	9,444,000	3.0	3,714,000	14.0	13,158,000				

Overview

Provides a list of all agents who meet the search criteria, ranked by Total \$ Volume.

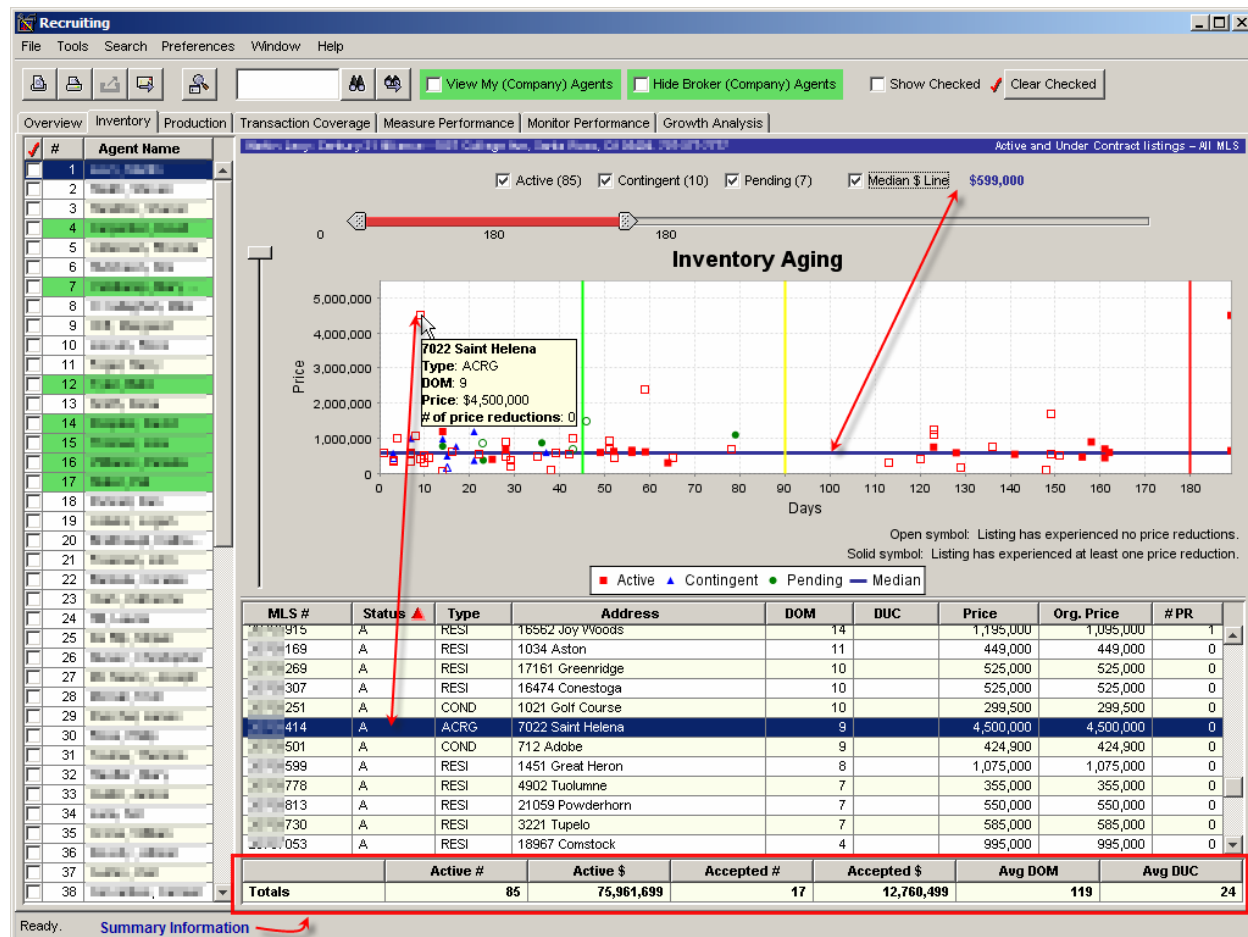
Current Search Results: Data based on the search criteria.

Last 12 Mos – All MLS: Data reflects all of an agent's transactions over the last 12 full months within the MLS. It is the data that is used for the analysis portion of the Recruiting tool: Production, Transaction Coverage, Measure Performance, Monitor Performance, and Growth Analysis.

Inventory

Provides information on the recruit's current book-of-business. The DOM aging information (scatter chart) can often give insight into the agent's ability to secure listings in the competitive market place at an appropriate price – because long DOM listings are tacit admission of the wrong price.

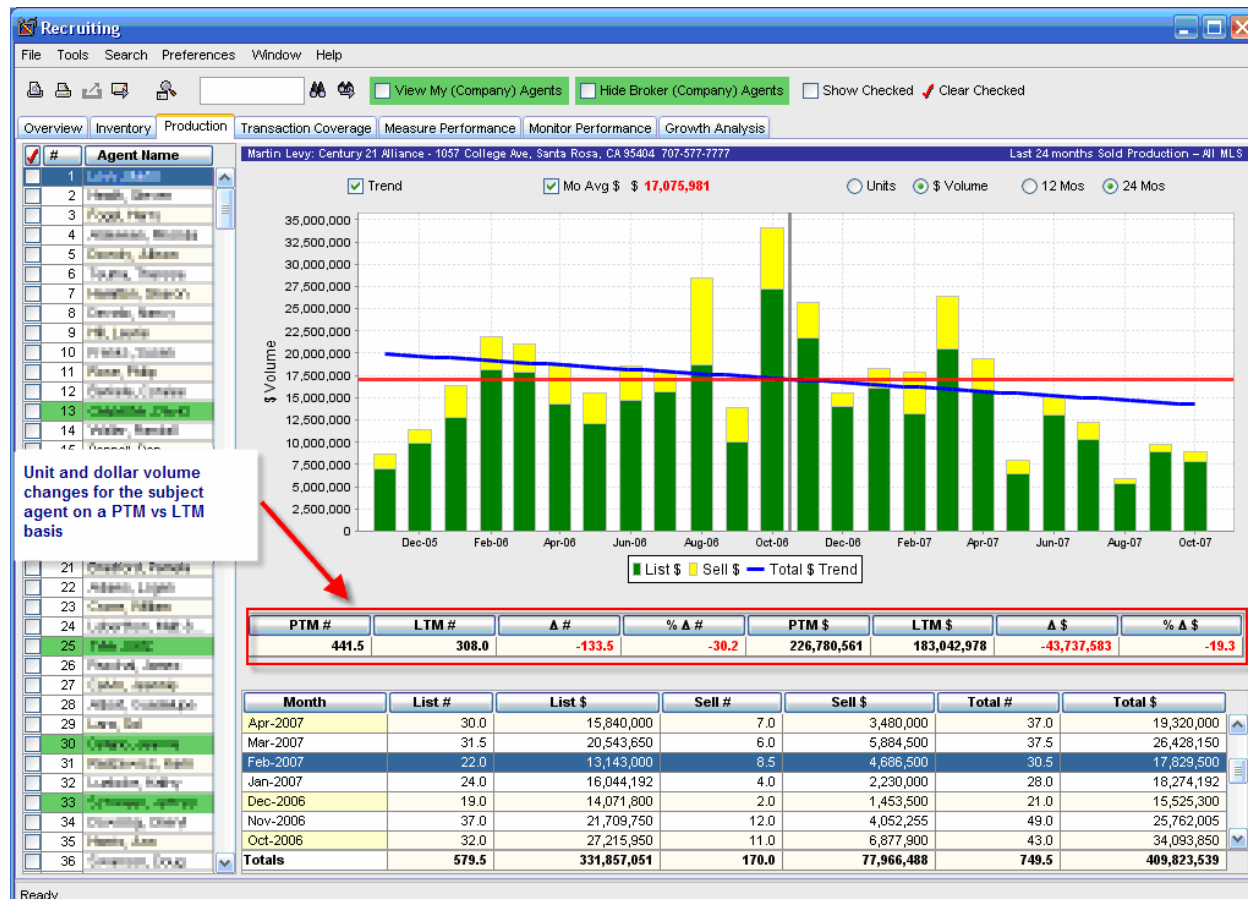
- Recruits can be viewed one-by-one by clicking on the individual rows.
- Place the mouse pointer on the chart symbol to display basic property & DOM information.
- Use the BrokerMetrics® right mouse click drill-down protocol to access the underlying record information.
- Summary information is located at the bottom of the chart table.
- See at a glance the median price for the agent's inventory.



Production

Provides a visual display of the recruit's production through the MLS.

- The last (12) or (24) month views are available using either \$ Volume or # Unit measurements
- List side transactions (**green**) are visually separated from sell side transactions (**yellow**) to indicate distribution and overall transaction balance.
- Summary information is provided at the bottom of the table.
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.

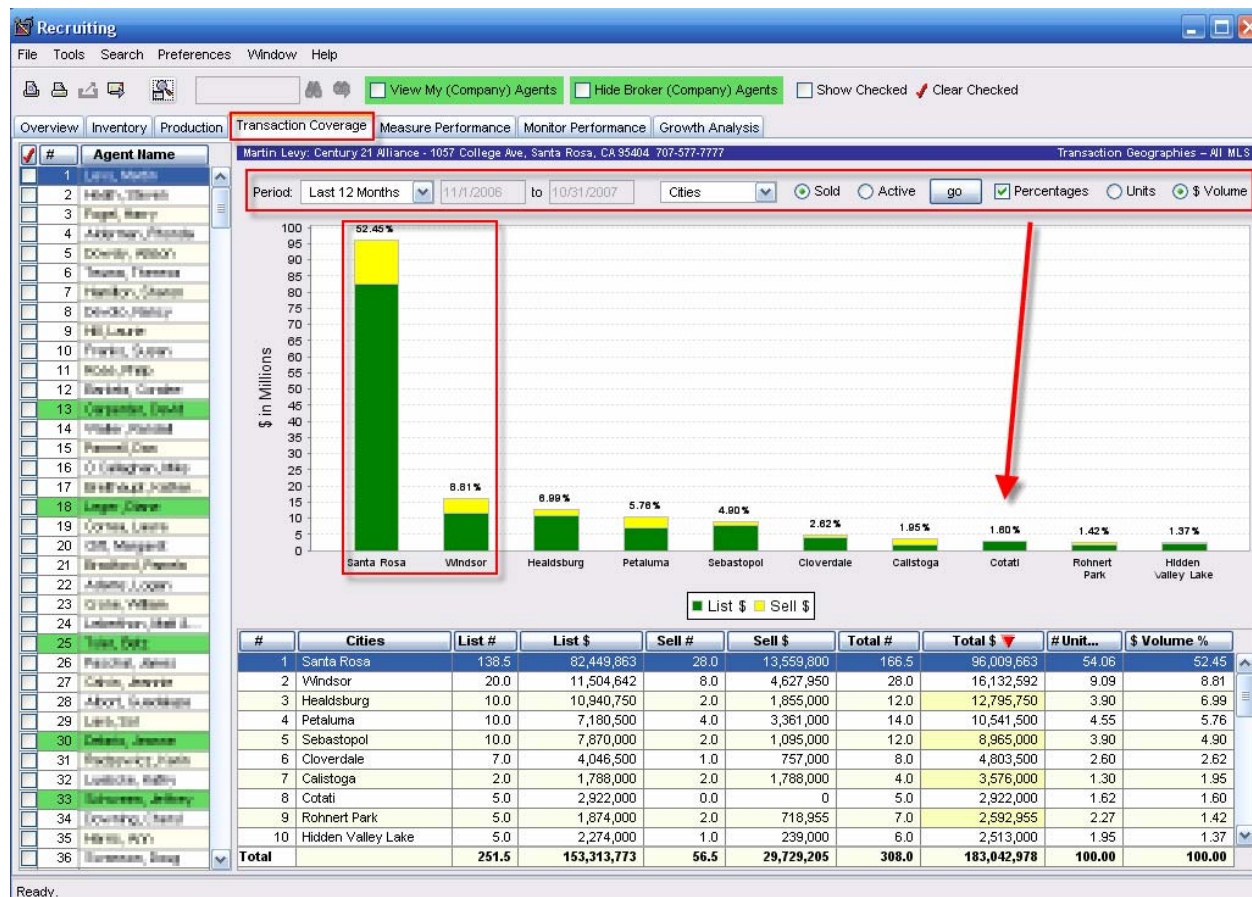


- View data for 12 or 24 full months.
- **Blue** trend line shows whether the agent's production has been trending upward or downward over the chosen time interval.
- **Red** line shows the agent's average sold \$ Volume or # Units per month over the selected time period.
- 24-month view includes a grid displaying the unit and dollar volume changes for the subject agent on an LTM vs. PTM basis.

Transaction Coverage

Allows the office manager to pinpoint where potential recruits are most productive. The information on this tab will help you spot recruits with the potential to fill the recruiting needs identified with the My Office/Transaction Coverage tool.

- # Units or \$ Volume displays.
- Sold (closed transaction) or Active listing coverage can be displayed.
- Any desired time frame may be used.
- The underlying records may be accessed via the right-click function.

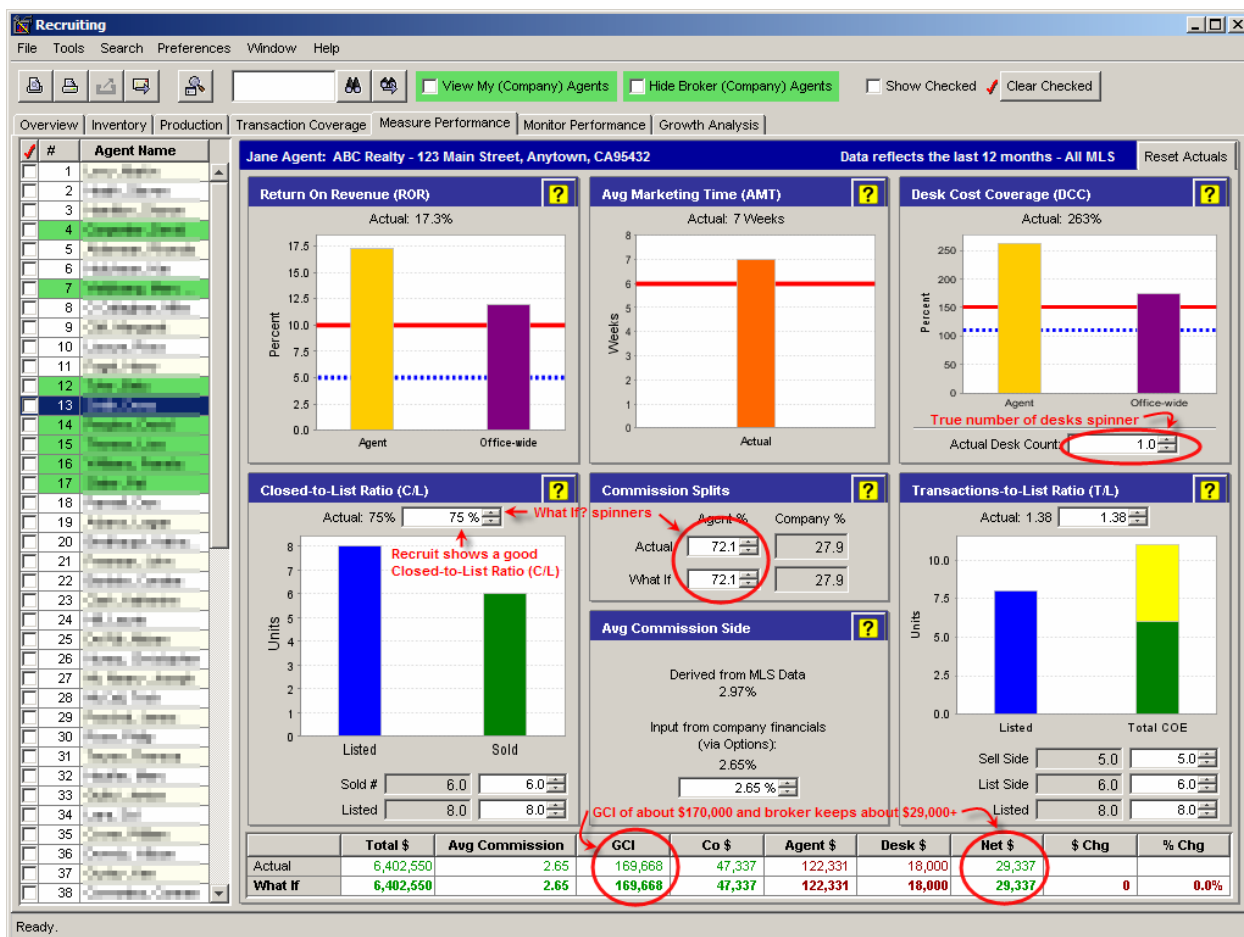


Measure Performance

Allows you to evaluate recruits from a performance metric perspective.

- View a recruit's key operating metrics from the past (12) months – do they process their book of business efficiently?
- Measure a recruit's past performance relative to your company's goals and objectives – do they meet your standards?
- Use the "Spinners" to determine what the recruit's last 12 months MLS production would have meant to your office
 - Factor in their true desk cost, i.e. assistants
 - What commission split are they asking for?

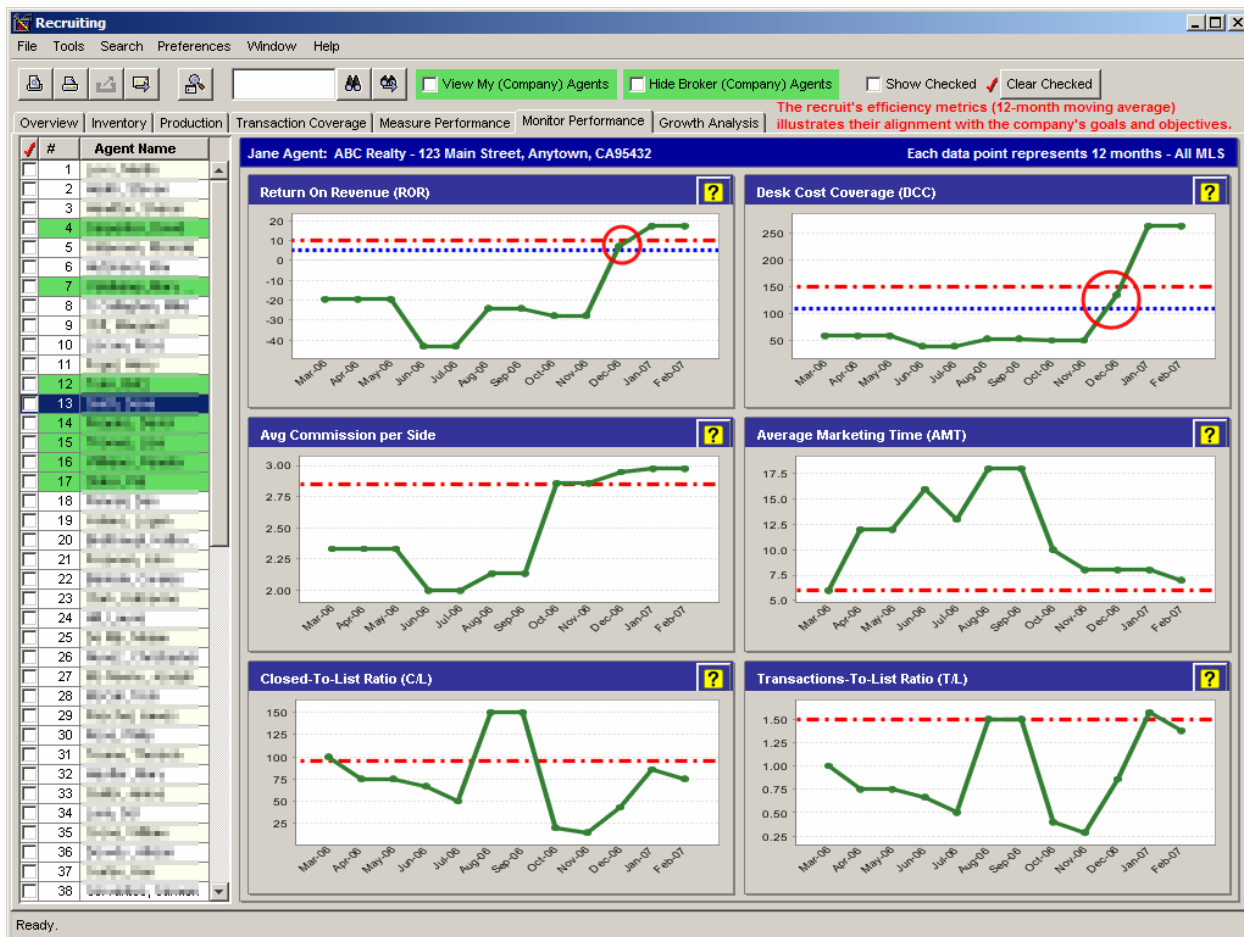
Now, look at the **Actual - Net \$** column to see what it would have meant to your office?



Monitor Performance

Looks at the twelve-month rolling average of the recruits' efficiency metrics to see the consistency of their performance.

- Company goals are displayed using red lines.
- Dotted blue lines are company minimum targets.
- The (12) month moving average is a good indicator of future performance.



Growth Analysis

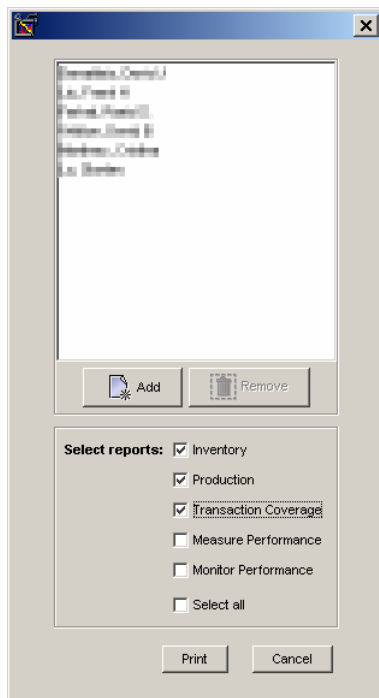
- Automatically calculates the unit and dollar volume changes for any agent in the MLS on an LTM vs. PTM basis.
- The Growth Analysis tab has been set so that agents new to the MLS will “float” to the top for easy identification. (Default settings: PTM = 0; LTM in descending order of unit production)

Recruiting													
File Tools Search Preferences Window Help													
<input type="button" value="Print"/> <input type="button" value="Find"/> <input type="button" value="Refresh"/> <input type="button" value="View My (Company) Agents"/> <input type="button" value="Hide Broker (Company) Agents"/> <input type="checkbox"/> Show Checked <input checked="" type="button" value="Clear Checked"/>													
Overview Inventory Production Transaction Coverage Measure Performance Monitor Performance Growth Analysis													
#	Office ID	Agent ID	Agent Name	LTM #	PTM # ▲	Δ	% Δ	LTM \$	PTM \$	Δ	% Δ		
46	000000	000000	XXXXXXXXXX	19.0	0.0	19.0		12,602,256	0	12,602,256			
46	000000	000000	XXXXXXXXXX	11.5	0.0	11.5		5,635,500	0	5,635,500			
46	000000	000000	XXXXXXXXXX	8.0	0.0	8.0		4,629,950	0	4,629,950			
46	000000	000000	XXXXXXXXXX	6.0	0.0	6.0		3,380,475	0	3,380,475			
45	000000	000000	XXXXXXXXXX	7.5	0.5	7.0	1,400.0	3,214,500	230,000	2,984,500	1,297.6		
44	000000	000000	XXXXXXXXXX	11.0	1.5	9.5	633.3	6,402,550	1,430,000	4,972,550	347.7		
43	000000	000000	XXXXXXXXXX	8.0	2.0	6.0	300.0	3,522,190	821,500	2,700,690	328.8		
42	000000	000000	XXXXXXXXXX	18.0	4.0	14.0	350.0	15,922,200	2,058,500	13,863,700	673.5		
42	000000	000000	XXXXXXXXXX	13.0	4.0	9.0	225.0	5,400,000	2,605,000	2,795,000	107.3		
42	000000	000000	XXXXXXXXXX	13.0	4.0	9.0	225.0	6,803,800	2,295,450	4,508,350	196.4		
42	000000	000000	XXXXXXXXXX	11.0	4.0	7.0	175.0	7,099,000	2,780,000	4,319,000	155.4		
41	000000	000000	XXXXXXXXXX	12.0	5.0	7.0	140.0	9,148,100	2,181,450	6,966,650	319.4		
41	000000	000000	XXXXXXXXXX	10.0	5.0	5.0	100.0	5,940,000	2,534,999	3,405,001	134.3		
40	000000	000000	XXXXXXXXXX	16.0	6.0	10.0	166.7	7,909,950	3,234,000	4,675,950	144.6		
40	000000	000000	XXXXXXXXXX	10.0	6.0	4.0	66.7	4,860,500	3,530,320	1,330,180	37.7		
40	000000	000000	XXXXXXXXXX	5.0	6.0	-1.0	-16.7	5,038,525	2,340,000	2,698,525	115.3		
39	000000	000000	XXXXXXXXXX	11.5	8.0	3.5	43.8	9,130,500	3,708,900	5,421,600	146.2		
39	000000	000000	XXXXXXXXXX	10.0	8.0	2.0	25.0	4,651,500	4,538,500	113,000	2.5		
38	000000	000000	XXXXXXXXXX	9.0	9.0	0.0	0.0	6,337,900	5,795,000	542,900	9.4		
38	000000	000000	XXXXXXXXXX	8.0	9.0	-1.0	-11.1	5,116,500	5,053,900	62,600	1.2		
37	000000	000000	XXXXXXXXXX	14.0	9.5	4.5	47.4	9,428,500	7,716,353	1,712,147	22.2		
36	000000	000000	XXXXXXXXXX	19.0	11.0	8.0	72.7	18,390,000	14,926,500	3,463,500	23.2		
36	000000	000000	XXXXXXXXXX	16.0	11.0	5.0	45.5	9,335,770	6,803,000	2,532,770	37.2		
35	000000	000000	XXXXXXXXXX	15.0	11.5	3.5	30.4	9,004,500	6,873,000	2,131,500	31.0		
34	000000	000000	XXXXXXXXXX	10.0	12.0	-2.0	-16.7	5,876,500	8,579,600	-2,703,100	-31.5		
34	000000	000000	XXXXXXXXXX	9.5	12.0	-2.5	-20.8	11,879,800	9,004,500	2,875,300	31.9		
33	000000	000000	XXXXXXXXXX	14.0	12.5	1.5	12.0	6,670,000	6,207,500	462,500	7.5		
32	000000	000000	XXXXXXXXXX	20.0	13.0	7.0	53.8	11,119,000	7,579,949	3,539,051	46.7		
32	000000	000000	XXXXXXXXXX	8.0	13.0	-5.0	-38.5	4,734,000	8,249,450	-3,515,450	-42.6		
31	000000	000000	XXXXXXXXXX	13.0	14.0	-1.0	-7.1	7,457,000	8,781,400	-1,324,400	-15.1		
30	000000	000000	XXXXXXXXXX	12.0	15.0	-3.0	-20.0	8,388,950	8,738,750	-349,800	-4.0		
29	000000	000000	XXXXXXXXXX	12.0	15.5	-3.5	-22.6	7,436,000	10,430,000	-2,994,000	-28.7		
28	000000	000000	XXXXXXXXXX	18.0	16.0	2.0	12.5	8,053,400	8,639,000	-585,600	-6.8		
28	000000	000000	XXXXXXXXXX	11.0	16.0	-5.0	-31.2	8,048,000	9,219,900	-1,171,900	-12.7		
28	000000	000000	XXXXXXXXXX	10.0	16.0	-6.0	-37.5	5,576,000	8,610,975	-3,034,975	-35.2		
27	000000	000000	XXXXXXXXXX	14.5	16.5	-2.0	-12.1	8,022,925	10,014,500	-1,991,575	-19.9		
27	000000	000000	XXXXXXXXXX	14.0	16.5	-2.5	-15.2	10,776,950	12,058,500	-1,279,550	-10.6		

Helpful Hint: First click on Growth Analysis; and then on the Production tab. By simply “walking” down the rows you can view each “new” agent’s production on a monthly basis over the last year.

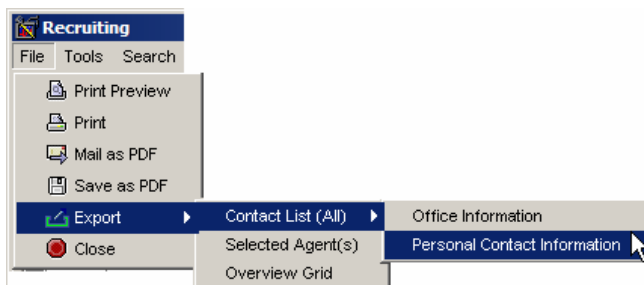
Reports

Select multiple reports for multiple agents:



Exports

Export office and personal contact information for all of the agents that met your search criteria or only for certain agents you select



Right-click on an agent's name to view (and then export)

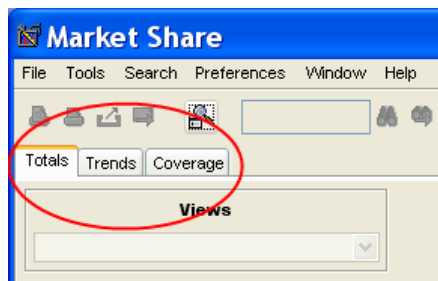
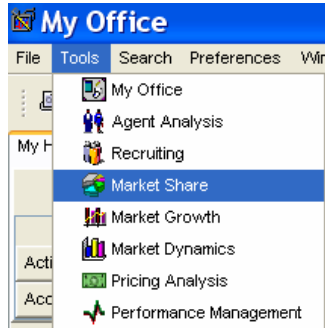
- Contact information
- Listings
 - For the time period specified in the search criteria
 - For the previous 12 months.



Market Share Searches

Provides production measurements for all offices, brokerages, Custom Market Share (CMS) , or Market Share Coverage sets(e.g. companies & brands) within the MLS using any criteria the user desires.

Three different market share functions (Totals, Trends, Coverage) will be accessed via individual tabs. You can toggle back and forth to all three report views by navigating between tabs.



Market Share Totals

Traditional market share measurements by \$ Volume or # Units.

Search Screen

- Property and Area Types mirror your MLS.
- Date Range: 24 months of data is available.
- Search Types: Office, Broker, or Custom Market Share groups (e.g. Major Brands).
- Status area shows the progress of your search. Stop the search at any time by clicking the **Cancel** button to go back and change the criteria.

Search

Custom

Clear Save this Search Search

MLS: BAREIS Type: Office Select My Search

Sold Active

Property Types:

☒ Residential
☒ Residential
☒ Condo/Coop/Other
☒ Farms/Ranches
☐ Mobile/Floating Home
☐ Mobile Home
☐ Floating Home
☐ Lots & Land
☐ Residential
☐ Commercial
☐ Acreage

Market Share is available by Office, Broker or custom groups, allowing you to integrate your personal knowledge of the market into the functionality of the tool.

Bedrooms: ☒ All
☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+

Full Bathrooms: ☒ All
☐ 1 ☐ 2 ☐ 3+

Date Range: Last 12 Months
 11/1/2006 to 10/31/2007

Price Range: ,000 to ,000

Construction Type: ☒ All ☐ New Construction ☐ Resale

Cities	Count
Santa Rosa	21,335
Napa	8,170
Sonoma	4,245
San Rafael	5,492

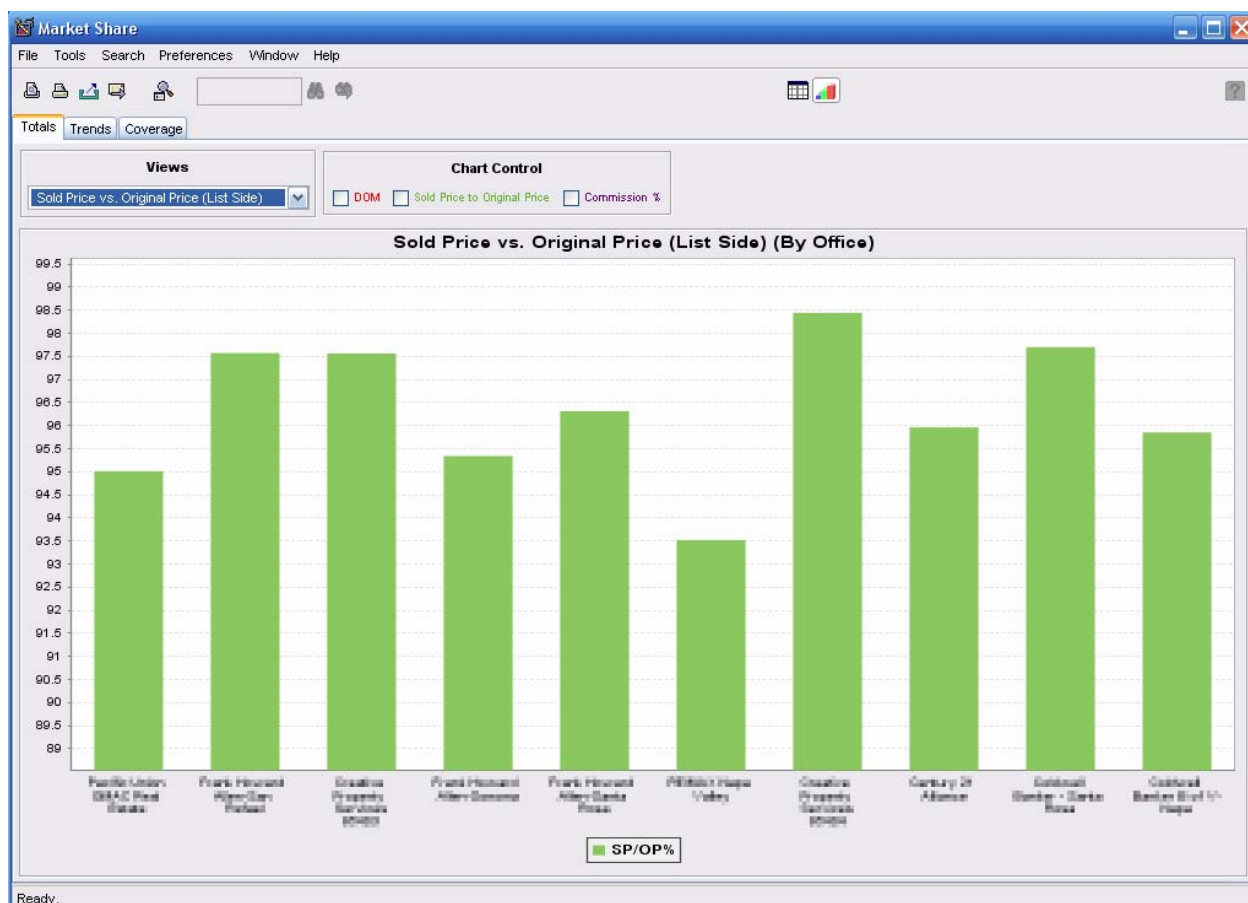
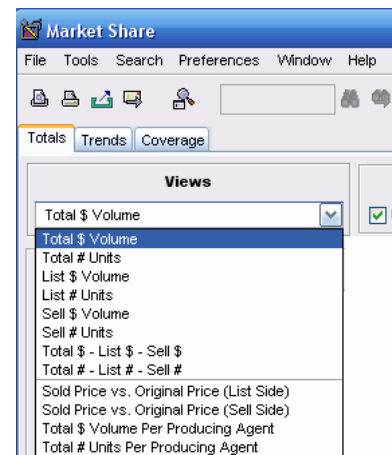
Add Remove Save

Search Results

Displayed in two forms: chart and grid. Toggle between them using the chart and grid buttons.

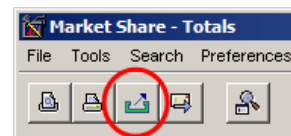


- Chart form is the default display, grid form is accessed via the toggle button.
- Print and email functionality is available.
- Multiple report formats are available, including:
 - \$ Volume and # Units for List-side only and Sell-side only.
 - List Side demonstrates your success in obtaining the highest prices relative to the original listing price for your sellers (List Side).
 - Sell Side displays your ability to obtain the lowest prices relative to the original listing price for your buyers.
- Sold Price vs. Original Price (List Side and Sell Side)

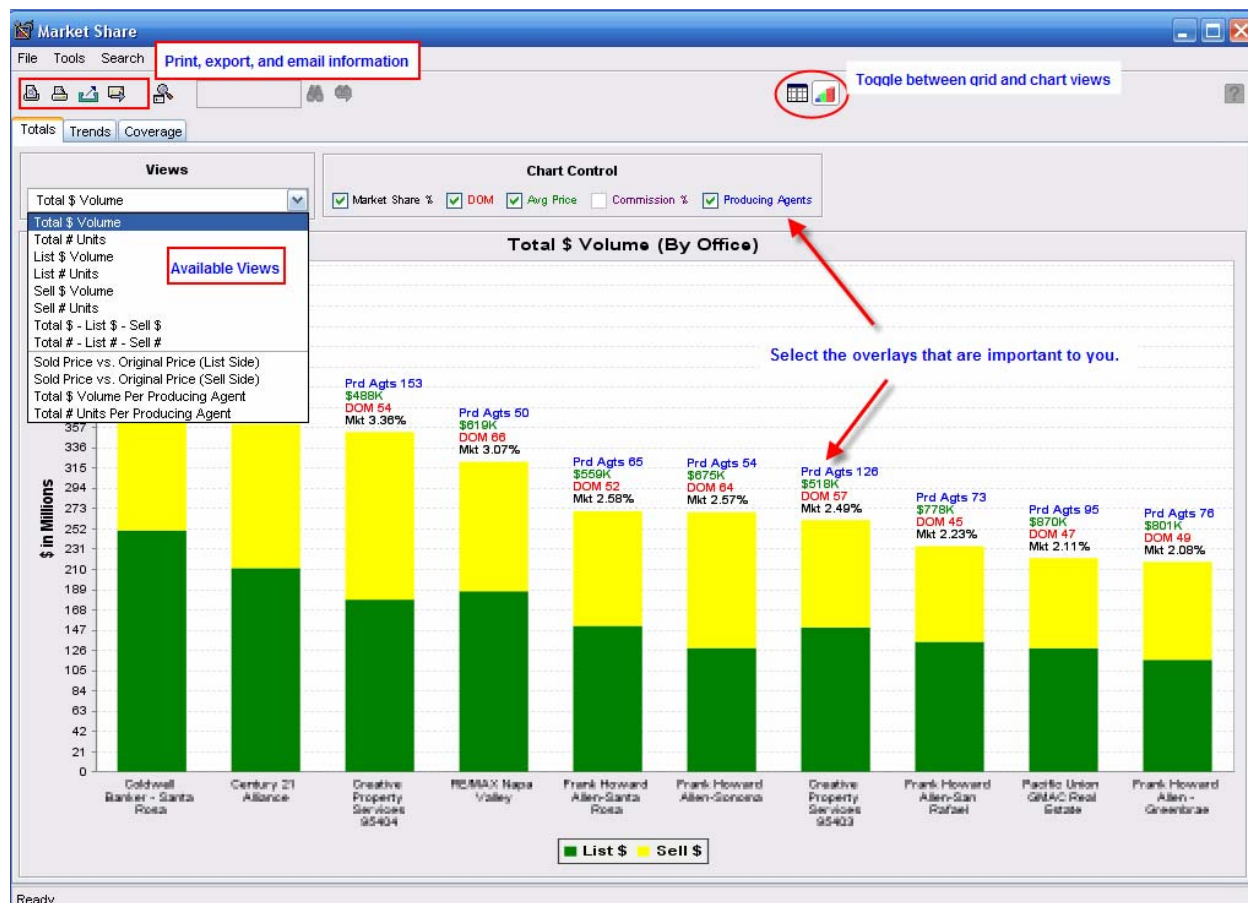


Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.

Export the entire grid with the click of a button. The export file will contain the exact data in the grid from which you initiated the export.



Charts



- Rows that are selected in the grid (see next page) will be displayed on the chart.
- Checkboxes above the chart allow you to display only the information that is important to you.
- Underlying information is accessed and displayed via the right mouse click function on the chart bars.

Grid

- Grid format displays all offices, brokerages, or custom market share groups that did at least one side of a transaction within the search criteria used (see example below).
- Top 10 rows (excluding non-MLS) are selected (bold red text) by default for convenience.
- The rows that are selected (by default or via mouse click) will be charted – chart esthetics will help you determine the appropriate limit.
- Use the Grid Controls to show or conceal highlighted rows and address columns
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable as a csv file for use in any database program (e.g. Excel) if desired.

Click on any row to change it from red to black, or vice versa. The red rows will be plotted on the charts (the default selection is the top ten, excluding Non-member Office).

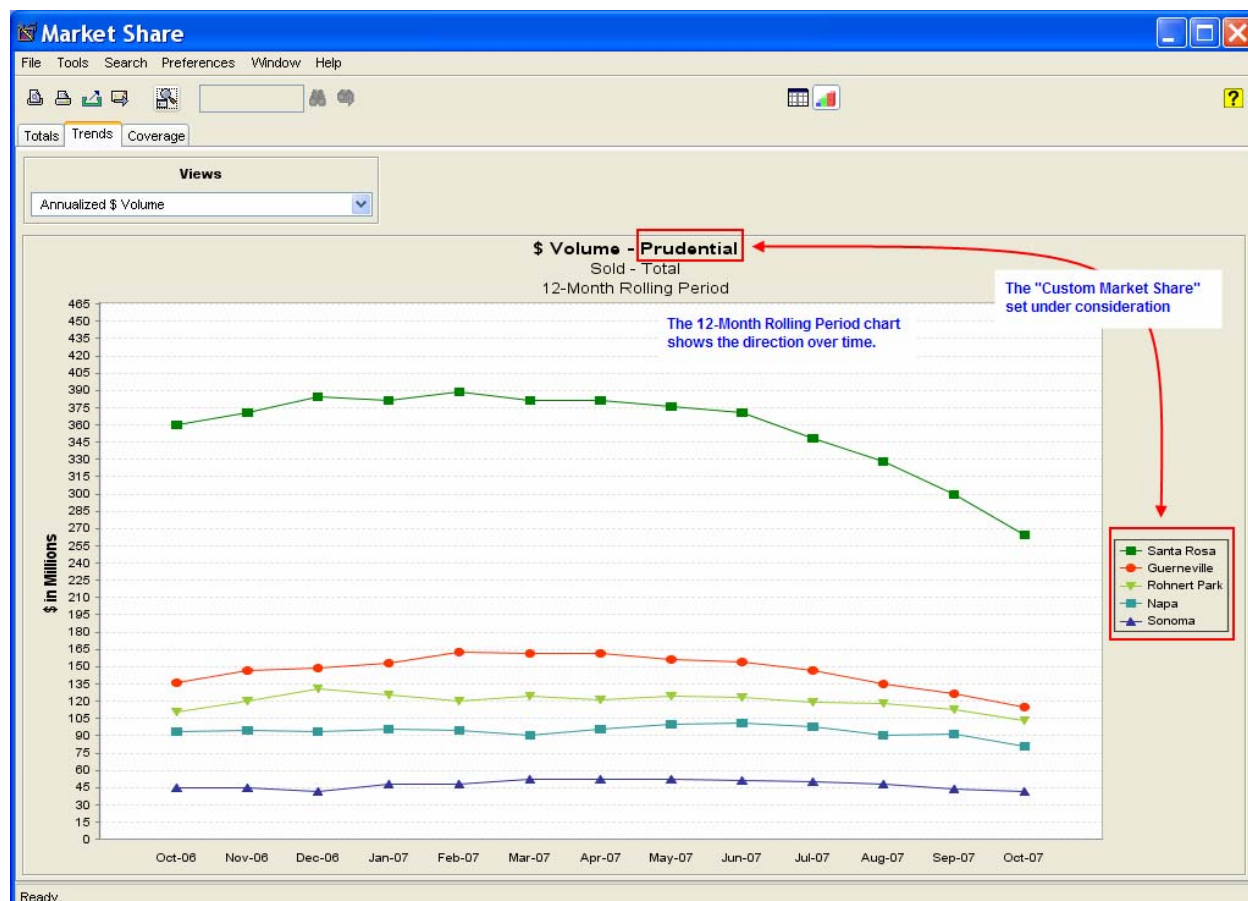
#	Office ID	Name	Address	City	State	Zip	County	List #	List \$	Sell #	Sell \$
1	ECBBV	Coldwell Banker B of V...	1775 Lincoln Ave	Napa	CA	94558	Napa	450	286,007,618	375	230,923,778
2	ACLBA13	Coldwell Banker - Santa...	600 Bicentennial Way Su...	Santa Rosa	CA	95403	Sonoma	465	250,556,585	412	223,053,929
3	BC2124	Century 21 Alliance	1057 College Ave	Santa Rosa	CA	95404	Sonoma	439	211,536,912	352	149,244,914
4	BCRE04	Creative Property Servi...	831 4Th St	Santa Rosa	CA	95404	Sonoma	366	178,701,310	356	173,893,487
5	EREMXNV	RE/MAX Napa Valley	780 Trancas	Napa	CA	94558	Napa	305	187,547,750	215	134,184,542
6	AALLN17	Frank Howard Allen-Sa...	460 Mission Blvd	Santa Rosa	CA	95409	Sonoma	272	151,648,953	212	118,811,358
7	BALE60	Frank Howard Allen-So...	470 First St East	Sonoma	CA	95476	Sonoma	194	128,622,658	205	140,698,183
8	BCRE07	Creative Property Servi...	3209 Cleveland Ave	Santa Rosa	CA	95403	Sonoma	289	149,832,477	215	111,409,156
9	AALLN13	Frank Howard Allen-Sa...	700 Fifth Ave	San Rafael	CA	94901	Marin	182	135,061,100	119	99,050,800
10	999999	Non-member Office	none	Santa Rosa	CA	95401	Sonoma	0	0	351	230,700,779
11	APURB02	Pacific Union GMAC Rea...	189 Sir Francis Drake Bl...	Greenbrae	CA	94904	Marin	144	128,544,445	111	93,189,059
12	AALLN10	Frank Howard Allen - Gree...	511 Sir Francis Drake Blvd.	Greenbrae	CA	94904	Marin	147	116,347,750	125	101,635,525
13	BRRE01	RE/MAX Central Santa Rosa	320 College Ave Ste 300	Santa Rosa	CA	95401	Sonoma	235	109,865,054	221	106,836,254
14	BCLD01	Coldwell Banker Deanza	800 Broadway	Sonoma	CA	95476	Sonoma	175	113,911,992	150	97,697,700
15	BPCR01	Prudential California Realty	456 South E Street	Santa Rosa	CA	95404	Sonoma	217	113,736,050	177	94,161,802
16	EMORLN03	Morgan Lane Inc, Napa	944 Main St	Napa	CA	94559	Napa	103	81,899,001	91	68,331,050
17	BWNE	Century 21 Wine Country	561 Broadway Ste A	Sonoma	CA	95476	Sonoma	129	73,972,025	130	72,810,200
18	ACLBA01	Coldwell Banker Greenbrae	350 Bon Air Center, Ste 100	Greenbrae	CA	94904	Marin	93	75,875,875	71	56,441,875
19	ACLBA04	Coldwell Banker San Rafael	711 Grand Avenue	San Rafael	CA	94901	Marin	112	79,951,650	78	51,989,744
20	ASOTH02	Sothebys International Rea...	25 East Napa St	Sonoma	CA	95476	Sonoma	49	58,152,000	60	72,506,250
21	BPUR01	Pacific Union GMAC Real E...	640 Broadway	Sonoma	CA	95476	Sonoma	69	75,662,000	56	53,665,235
22	BMCB01	McBride Realty	6520 Oakmont Dr	Santa Rosa	CA	95409	Sonoma	132	68,552,430	99	52,228,730
23	BHUR01	Hurd Real Estate	1401 Fourth Street	Santa Rosa	CA	95404	Sonoma	131	65,285,657	82	44,844,645
24	ACLBA21	Coldwell Banker-Sebastopol	101 Morris Street Ste 101	Sebastopol	CA	95472	Sonoma	106	54,506,587	107	55,595,626
25	BPUR03	Pacific Union GMAC Real E...	1508 Main St	St. Helena	CA	94574	Napa	48	51,056,011	51	43,133,450
26	BWMD	Windermere Wine Country ...	3333 Mendocino Ave, #210	Santa Rosa	CA	95403	Sonoma	74	41,896,013	66	40,821,340
27	BPUR02	Pacific Union-Coralee Bark...	900 College Ave	Santa Rosa	CA	95404	Sonoma	92	52,847,335	54	29,631,290
28	APURB01	Pacific Union GMAC Real E...	60 Belvedere Drive	Mill Valley	CA	94941	Marin	57	53,084,100	49	40,928,900
29	EMORLN04	Morgan Lane Re Yountville	6795 Washington St.	Yountville	CA	94599	Napa	49	40,928,900	49	40,928,900
30	EMORLN05	Morgan Lane	600 Broadway	Sonoma	CA	95476	Sonoma	45	20,680,060	20	24,013,600
								8,740	5,286,551,9...	8,593	5,198,465,6...

Summary Information

Market Share Trends

Measures market share units, dollar volume, and their percentages over time.

12-Month Rolling Period View Chart



Charts twelve-month production totals for the previous twelve full months for each of the offices, brokers or Custom Market Share Groups.

Each data point (node) is comprised of 12 consecutive months of data, "rolling" forward in time on a monthly basis. The value associated with each node encompasses that month's data plus all of the data from the preceding 11 months. For example, the Oct-07 data point begins on 11/1/06 and ends on 10/31/07; it includes all of the data for the following months:

1. Nov-06
2. Dec-06
3. Jan-07
4. Feb-07
5. Mar-07
6. Apr-07
7. May-07
8. Jun-07
9. Jul-07
10. Aug-07
11. Sept-07

12. Oct-07

- Mouse over the line nodes to display the values.
- The first five entities, ranked on the most recent month's values, are plotted on the chart by default. All entities are shown in the grid.

Grid

The screenshot displays the 'Market Share' application window. The main grid shows market data for various locations, including 'All Other', 'Napa', 'Santa Rosa', 'Guerneville', 'Rohnert Park', and 'Sonoma'. The columns include 'Name', '% Δ', 'Oct-07 - Oct-06 \$', 'Oct-07', 'Sep-07', 'Aug-07', 'Jul-07', and 'Jun-07'. A red arrow points to the 'All Other' group, with a text box stating: 'The "All Other" group contains all offices that were not included in one of the custom groups'. Another red arrow points to the 'Napa' row, which has a blue 'Office Breakdown' button next to it. A pop-up window titled 'Office Breakdown for Napa' is open, showing a detailed grid of monthly data for Napa, with columns for 'Name', '% Δ', '\$', and months from Oct-07 to Apr-07. A red circle highlights the 'Address' checkbox in the pop-up window. At the bottom of the main grid, a text box states: 'The monthly figures represents 12-month averages of the market actually -- List + Sell side transactions volume. The "true" market size is thus half that amount'. The 'Totals' row at the bottom shows a value of 11,268,266,781 for Oct-07, which is circled in red.

Name	% Δ	Oct-07 - Oct-06 \$	Oct-07	Sep-07	Aug-07	Jul-07	Jun-07
All Other	-10.3	-1,194,324,526	10,426,913,619	11,228,034,731	11,976,914,547	12,537,117,731	12,932,562,378
Napa	-6.4	-21,765,465	316,671,276	351,353,166	362,801,516	377,870,216	388,121,619
Santa Rosa	-26.5	-95,314,559	264,401,007	299,106,640	328,456,660	348,296,560	370,847,820
Guerneville	-15.2	-20,703,036	115,268,340	126,400,350	134,740,076	146,863,226	153,841,026
Rohnert Park							123,681,999
Sonoma							50,605,840
Totals	-10.7	-1,343,137,237	11,268,266,781	12,161,794,926	12,969,641,288	13,579,032,572	14,019,660,682

- Market share grid allows for right mouse click drill down functionality.
- Strings of zeros beginning in the left most column are indicative of new office formation for any given group (brand or company).
- Summary totals = % growth for entire market (as defined by the search criteria).
- Individual rows = % growth for that company, office or custom group.
- Right mouse click drill-down functionality is available here.
 - Office Detail - specific office information.
 - Office Listings – audit trail to the records.
- The All Other group contains every office in the MLS that is not included in one of the named custom groups.

Comparison Period Views

Charts



These views display two bars for each entity. Together, the bars represent a time-period over time-period comparison of the status variable selected in the search criteria.

For example, if Q4 (2006 vs. 2005) is selected in the search criteria, the first bar for each entity plotted would include data covering the period from 10/1/07-12/31/06, and the second bar would cover the period 1/1/06-12/31/05.

- The first ten entities, based on \$ volume for the most recent time period, are plotted. Add or remove entities from the chart by clicking on the corresponding row in the grid.
- Right-click functionality provides additional information:
 - Office Detail - specific office information.
 - Office Listings – audit trail to the records.
- Four views are available:
 - Change in \$ Volume
 - Change in Percent Market Share - \$ Volume
 - Change in # Units
 - Change in Percent Market Share - # Units

Grids

Market Share

File Tools Search Preferences Window Help

Totals Trends Coverage

Views
Change in \$ Volume

Grid Controls
☒ All Rows
 ☐ Selected Rows
 Clear Selections
 ☐ Address Columns

Select Address Columns to view address fields.

Name	% Δ	QTD 2007-QTD 2006 \$	QTD 2007 \$	QTD 2006 \$	DOM % Δ	DOM Change	QTD 2
Coldwell Banker B of V-Napa	-60.37	-89,615,950	58,832,050	148,448,000	55.36	31	
Coldwell Banker - Santa Rosa	-62.27	-87,836,624	53,210,973	141,047,597	36.54	19	
RE/MAX Napa Valley	-49.01	-39,431,700	41,017,500	80,449,200	3.85	2	
Sothebys International Realty	15.05	5,050,650	38,604,400	33,553,750	18.37	9	
Creative Property Services	-65.59	-69,957,040	36,696,260	106,653,300	65.00	26	
Century 21 Alliance	-60.15	-54,216,930	35,919,875	90,136,805	11.54	6	
Frank Howard Allen-Santa Rosa	-66.27	-62,112,498	31,613,525	93,726,023	40.38	21	
Prudential California Realty	-55.58	-38,421,836	30,705,880	69,127,716	35.59	21	
Non-member Office	-12.70	-4,118,975	28,322,950	32,441,925	44.64	25	
Creative Property Services	-61.74	-41,254,499	25,565,150	66,819,649	47.62	20	
Coldwell Banker Deanza	-61.84	-40,976,442	25,285,600	66,262,042	-27.27	-18	
Pacific Union GMAC Real Estate	-26.03	-8,079,258	22,964,200	31,043,458	34.33	23	
RE/MAX Central Santa Rosa	-63.53	-28,635,125	16,441,100	45,076,225	11.76	6	
Harry & Sherree Fogel Fine Prop	68.35	5,881,000	14,485,000	8,604,000	175.68	65	
Frank Howard Allen-Sonoma	-79.87	-57,001,425	14,363,000	71,364,425	42.86	21	
McBride Realty	-45.56	-11,715,750	13,997,500	25,713,250	-27.03	-20	
Pacific Union-Coralee Barkela	-39.39	-8,322,950	12,807,300	21,130,250	51.11	23	
Windermere Wine Country Prop.	-53.55	-13,576,205	11,775,355	25,351,560	169.23	66	
Pacific Union GMAC Real Estate	-63.74	-19,739,950	11,229,700	30,969,650	61.76	42	
Morgan Lane	98.85	5,474,000	11,011,500	5,537,500	-56.14	-64	
Century 21 Wine Country	-70.45	-26,124,850	10,960,500	37,085,350	30.00	15	
Coldwell Banker-Sebastopol	-67.09	-21,797,352	10,694,000	32,491,352	21.95	9	
Morgan Lane Inc, Napa	-73.99	-29,755,500	10,461,400	40,216,900	42.65	29	
CPS/Property Advocates	-52.88	-11,733,454	10,457,000	22,190,454	-1.89	-1	
Hurd Real Estate	-73.22	-25,113,262	9,184,438	34,297,700	7.14	5	
Morgan Lane	-60.47	-12,268,000	8,021,000	20,289,000	-18.48	-17	
RE/MAX North Bay Realty	-68.76	-17,645,050	8,018,000	25,663,050	31.25	10	
Prudential California Realty	-71.19	-17,962,380	7,269,720	25,232,100	-5.66	-3	
RE/MAX Napa Valley	-53.48	-8,302,350	7,221,400	15,523,750	241.67	58	
	-60.80	-1,494,943,797	963,897,952	2,458,841,749	33.33	17	

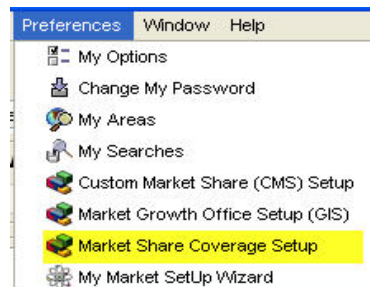
Ready. Scroll to view additional columns

- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired
- Office Breakdown (Broker and Custom Market Share searches) – provides a list of the offices included in each group.
- Use the Grid Controls to show or conceal highlighted rows and address columns
- Office Detail – specific office information
- Office Listings – audit trail down to the individual records

Market Share Coverage

Provides a tool that allows the office manager to determine the office's most active market areas for any particular property type (or combination of property types).

- The default coverage group (My Office) will include your office.
- Additional coverage groups can be created in the Preferences menu.
- The report data will be displayed based on the area type selected.



 A screenshot of the 'Search' window. The window has a 'Custom' tab and buttons for 'Clear', 'Save this Search', and 'Search'. It includes filters for 'MLS' (BAREIS), 'Type' (My Office (1 offices)), and 'Select My Search'. There are radio buttons for 'Sold' and 'Active'. The 'Property Types' section has checkboxes for Residential (checked), Single Family (checked), Condo/Coop (checked), Farms/Ranches (checked), Mobile/Floating Home (unchecked), Mobile Home (unchecked), Floating Home (unchecked), Lots & Land (unchecked), Residential (unchecked), Commercial (unchecked), and Acreage (unchecked). The 'Display Report By' dropdown is open, showing options: Select an Area Type, Select an Area Type, Counties, Cities (highlighted), MLS Areas, and ZIP Codes. Below this are 'Add', 'Remove', and 'Save' buttons. The 'Bedrooms' section has checkboxes for 0, 1, 2, 3, 4, 5+, and 'All' (checked). The 'Full Bathrooms' section has checkboxes for 1, 2, 3+, and 'All' (checked). The 'Date Range' is set to 'YTD' with dates 1/1/2008 to 6/9/2008. The 'Price Range' is set to ,000 to ,000. The 'Construction Type' section has radio buttons for All (checked), New Construction, and Resale.

Your office is included in the default coverage group ("My Office").

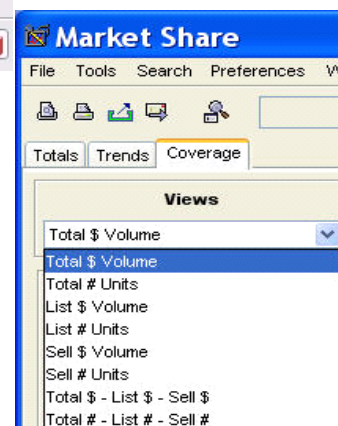
Make a selection from this list to display the reports by the area types that are available for your MLS.

Search Results

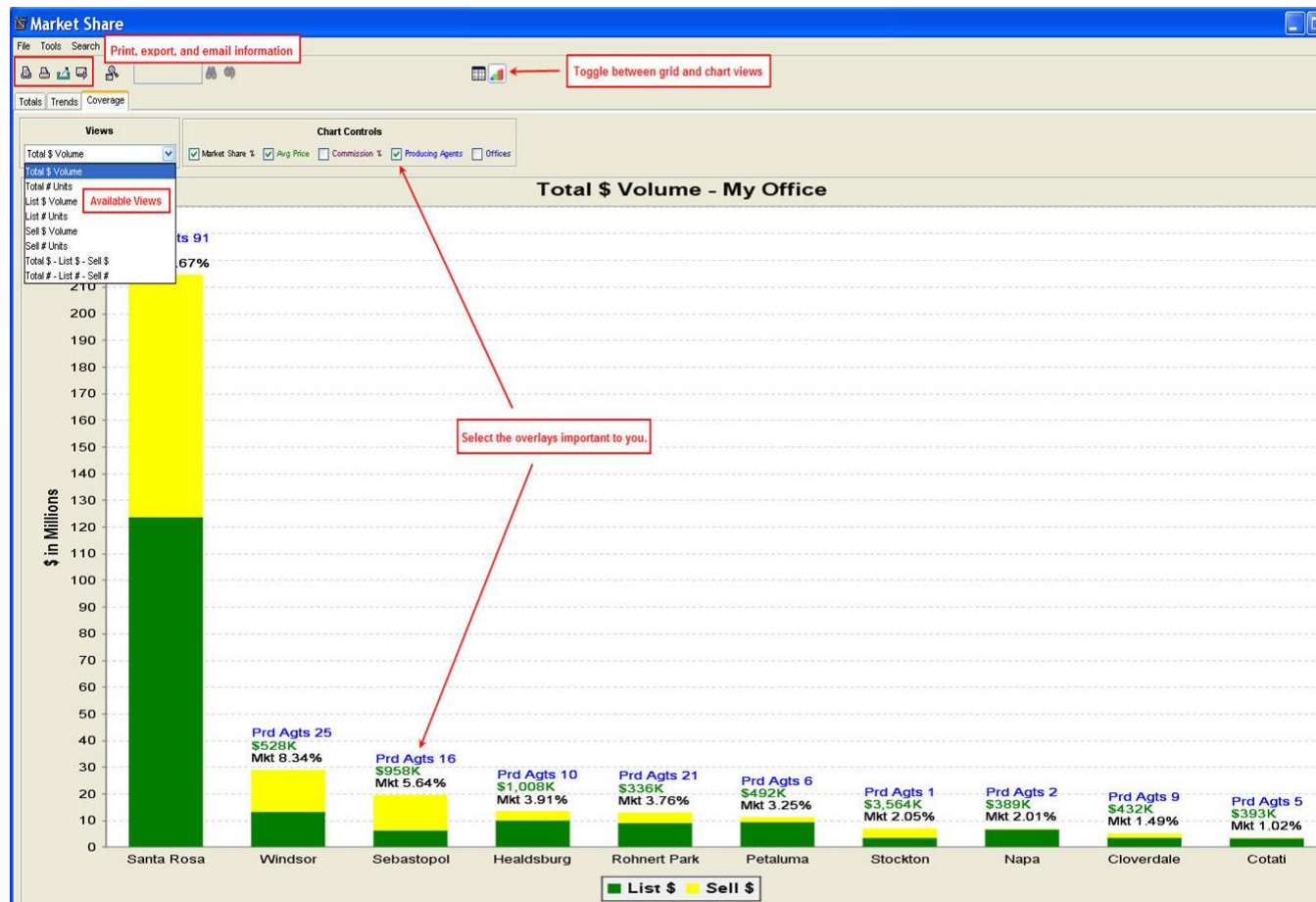
Displayed in two forms: chart and grid. Toggle between them using the chart and grid buttons.



- Chart form is the default display, grid form is accessed via the toggle button.
- Print and email functionality is available.
- Multiple report formats are available, including:
 - \$ Volume and # Units for List-side only and Sell-side only.
 - List Side demonstrates your success in obtaining the highest prices relative to the original listing price for your sellers (List Side).



Chart



Grid

#	City	List #	List \$	Sell #	Sell \$	Total \$	Total \$ ▼	Mkt %	Avg Price	Com %	M.S. Rts	Prod Agents	Ofcs
1	Santa Rosa	244	122,478,580	167	98,966,284	419	214,644,864	61.67	522,886	2.74	129	91	1
2	Windsor	28	13,352,851	25	16,448,515	55	29,822,266	6.34	527,479	2.73	129	25	1
3	Schustopol	76	6,349,969	19	13,298,880	29	19,647,849	5.64	955,474	2.64	129	16	1
4	Healdsburg	18	19,636,580	4	3,578,888	14	13,668,588	3.91	1,807,889	2.71	129	19	1
5	Robert Park	26	9,847,270	13	4,829,588	39	13,897,278	3.76	335,827	2.84	129	21	1
6	Portola	24	9,484,258	7	1,837,888	23	11,321,258	3.25	491,315	2.74	129	8	1
7	Stockton	1	3,654,888	1	3,654,888	2	7,318,888	2.04	3,654,888	2.04	129	1	1
8	Napa	17	6,737,980	1	258,888	18	6,995,988	2.01	388,661	2.80	129	2	1
9	Cloverdale	8	3,488,888	4	1,578,888	12	5,178,888	1.49	421,567	2.79	129	9	1
10	Cotati	8	3,377,888	1	165,888	9	3,543,888	1.02	393,888	2.83	129	5	1
11	Bozoga Bay	2	2,352,000	1	1,168,000	3	3,520,000	1.01	1,173,333	2.50	129	3	1
12	Forestville	2	1,983,000	5	2,287,500	7	3,480,500	1.00	497,214	2.88	129	7	1
13	Sonoma	6	2,204,000	1	335,000	7	2,619,000	0.75	374,143	2.89	129	4	1
14	Hidden Valley Lake	5	1,160,000	3	1,261,000	8	2,421,000	0.70	302,625	2.84	129	5	1
15	Guerneville	2	407,000	1	535,000	3	1,022,000	0.29	340,667	2.97	129	2	1
16	Ukiah	3	730,000	1	221,000	4	960,000	0.28	240,000	3.33	129	2	1
17	American Canyon	2	905,000	0	0	2	905,000	0.26	452,500	3.00	129	2	1
18	Norrito	0	0	1	775,000	1	775,000	0.22	775,000	2.50	129	1	1
19	Hornwood	0	0	1	755,000	1	755,000	0.22	755,000	2.50	129	1	1
20	Agua Caliente	1	712,848	0	0	1	712,848	0.20	712,848	1.90	129	1	1
21	Timber Cove	0	0	1	710,000	1	710,000	0.20	710,000	2.50	129	1	1
22	Geyserville	1	363,000	1	363,000	2	706,000	0.20	353,000	2.50	129	2	1
23	Caldiero	2	680,200	0	0	2	680,200	0.20	340,100	2.93	129	4	1
24	Calistoga	1	645,000	0	0	1	645,000	0.19	645,000	3.00	129	2	1
25	Penningsville	1	640,000	0	0	1	640,000	0.18	640,000	2.50	129	1	1
26	Occidental	1	570,000	0	0	1	570,000	0.16	570,000	3.00	129	1	1
27	Clearlake	4	372,000	1	187,500	5	559,500	0.16	111,000	2.78	129	4	1
28	Kelseyville	2	550,000	0	0	2	550,000	0.16	275,000	2.77	129	2	1
29	Green Valley	0	0	1	345,000	1	345,000	0.10	345,000	2.50	129	1	1
30	Villis	0	0	1	306,160	1	306,160	0.09	306,160	2.50	129	1	1
31	Nice	0	0	1	270,000	1	270,000	0.08	270,000	3.00	129	1	1
32	Rio Nido	0	0	1	261,000	1	261,000	0.07	261,000	3.00	129	1	1
33	Clearlake Oaks	1	191,000	0	0	1	191,000	0.05	191,000	3.00	129	2	1
34	Lucerne	1	150,000	0	0	1	150,000	0.04	150,000	3.00	129	2	1
35	Monte Rio	1	140,000	0	0	1	140,000	0.04	140,000	3.00	129	1	1

- Top 10 regions are selected (bold red text) for convenience.
- The rows that are selected (by default or via mouse click) will be charted – chart esthetics will help you determine the appropriate limit.
- Use the Grid Controls to show or conceal highlighted rows
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable as a csv file for use in any database program (e.g. Excel) if desired.

Market Growth

Allows you to determine the rate of market growth in various geographical areas (counties, cities and ZIP codes). You can then compare your office(s) performance against these general market conditions. In addition, you can export the underlying data for use with off-the-shelf GIS mapping software (such as Microsoft's MapPoint) to create maps that “visually” identify areas of opportunity in *your* market.

Market Growth Search Screen

- Click on the property type(s) desired.
- Select from the picklist the geographical grouping you would like for aggregation and mapping purposes.
- Select the appropriate timeframe.
- Select additional criteria if desired.

Market Growth Search

Clear Save this Search Search

The growth statistics are based on closed MLS transactions.
Each closing generates one transaction side only.

MLS: BAREIS Select My Search

Property Types

- ☐ Residential
 - ☐ Single Family
 - ☐ Condo/Coop
 - ☐ Farms/Ranches
- ☐ Mobile/Floating Home
 - ☐ Mobile Home
 - ☐ Floating Home
- ☐ Lots & Land
 - ☐ Residential
 - ☐ Commercial
- ☐ Acreage

Area Type Select an Area Type

Description	Count
-------------	-------

Add Remove Save

Bedrooms: ☒ All ☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+

Full Bathrooms: ☒ All ☐ 1 ☐ 2 ☐ 3+

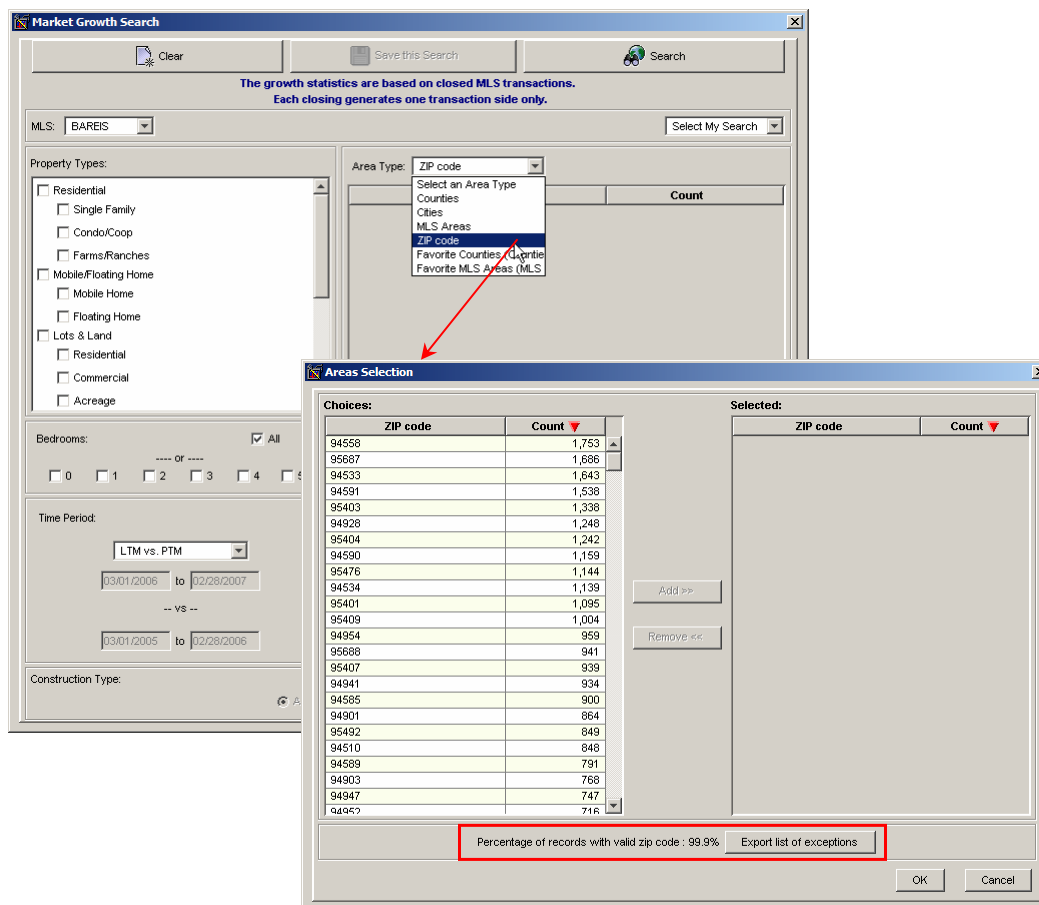
Time Period: LTM vs. PTM YTD (2007 vs. 2006) QTD (2007 vs. 2006) Q4 (2006 vs. 2005) Q3 (2006 vs. 2005) Q2 (2006 vs. 2005) Custom Date

Price Range: ,000 to ,000

Construction Type: ☒ All ☐ New Construction ☐ Resale

Determine market growth over the time period that best fits your planning needs.

- Only records of Sold properties with valid counties, cities or zip codes will be returned in the search, so only valid cities, counties or zip codes will appear in the Choices pane on the Add Areas window.
- Export a csv file of listings with invalid counties, cities or zip codes so you can follow up with the appropriate people for corrections.



Market Growth

Compares the sales volume (number of units sold and dollar volume) in the selected areas over two time periods and then calculates the growth (or decline) between those periods.

- The underlying information has been formatted for GIS export, i.e. listings with invalid zip codes or cities (due to misspellings, non-standard abbreviations, etc.) will not be included in the data set or calculations.
- Information displayed is list-side only because it is growth, not market share, that is being measured.
- The MLS commission information is based on the percentage that is offered to the cooperating broker (sell side) by the listing agent/office.
- Horizontal scrollbar at the bottom of the screen allows you to view hidden columns.

Market Growth

File Tools Search Preferences Window Help

Commission figures displayed reflect the percentages offered to cooperating brokers on the sell side. Useful market information can often be inferred from these figures.

View: Percent Growth - \$ Volume

Market Growth Office Growth

LTM = Last Twelve Months
PTM = Previous Twelve Months

ZIP code	LTM \$	PTM \$	LTM-PTM \$	\$ (%) ▼	LTM #	PTM #	LTM-PTM #	# (%)	LTM Mdn \$	PTM Mdn \$	LTM-PTM Mdn \$	Mdn \$ (%)
95409	240,501,632	299,310,299	-58,808,667	-19.65	381	483	-102	-21.12	579,900	592,000	-12,100	-2.0
95404	334,354,730	423,662,439	-89,307,709	-21.08	437	578	-141	-24.39	635,111	611,000	24,111	3.9
95403	266,246,897	346,641,564	-80,394,667	-23.19	462	606	-144	-23.76	519,000	534,975	-15,975	-2.9
95405	138,875,404	190,693,094	-51,817,690	-27.17	245	334	-89	-26.65	520,000	539,975	-19,975	-3.7
95401	186,736,150	269,121,807	-82,385,657	-30.61	365	538	-173	-32.16	485,000	485,000	0	0.0
95407	150,287,724	266,472,190	-116,184,466	-43.60	283	493	-210	-42.60	525,000	527,000	-2,000	-0.4
Totals	1,317,002,537	1,795,901,393	-478,898,856	-26.67	2,173	3,032	-859	-28.33	522,500	537,475	-14,975	-2.8

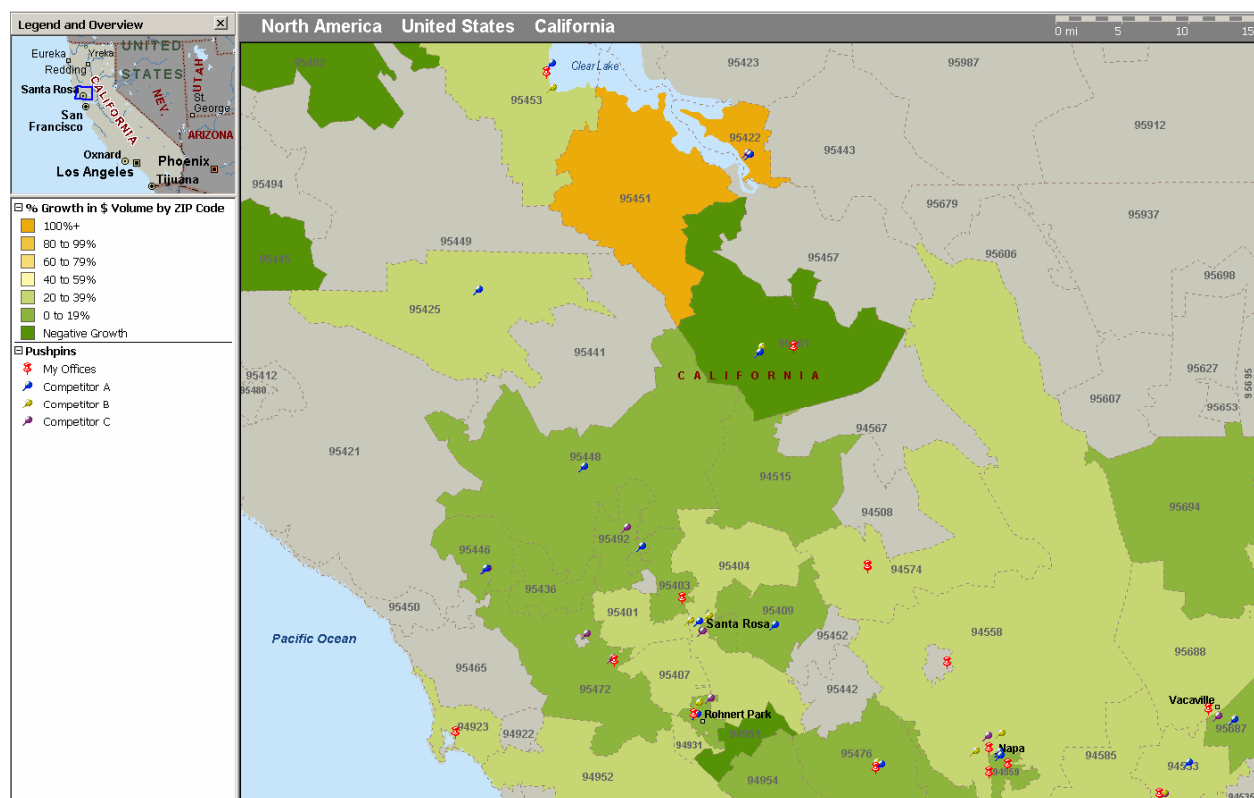
Summary values are weighted averages.

Ready.

Export

Export the information to a csv file for use with a geographic information system (GIS) such as MapPoint.

- Data is aggregated by the area type specified in the search criteria.
- See areas of high and negative growth, as well as areas that have remained static.
- Overlay office locations (see Office Location, pg. 79) as pushpins to get a complete picture of how your offices are situated relative to prevailing market conditions.
- Compare any office's performance relative to these market conditions. Visually determine if there are any expansion opportunities available.



Office Growth

Compares the sales volume (number of units sold and dollar volume) for the offices in the selected areas over two time periods and then calculates the growth (or decline) between those periods.

- The underlying information has been formatted for GIS export, i.e. listings with invalid zip codes or cities (due to misspellings, non-standard abbreviations, etc.) will not be included in the data set or calculations.
- Information displayed is list-side only because it is growth, not market share, that is being measured.
- Commission information is based on the percentage that is offered to the cooperating broker (sell side) by the listing agent/office.
- Horizontal scrollbar at the bottom of the screen allows you to view hidden columns.

View: Percent Growth - \$ Volume

Office Group: CPS

Commission figures displayed reflect the percentages offered on the sell side. Useful market information can often be inferred.

View all of the offices that contributed to the growth. Or, use the Market Growth Office Location Setup on the Preferences menu to create groups of offices so you can focus on a specific subset.

Office ID	Name	Address	City	State	Zip	County	LTM \$	PTM \$	LTM-PTM \$	\$ (%)	LTM #
BFOXGLO	CPS Foxglove Properties	3362	Sebastopol	CA	95439	Sonoma	3,034,000	1,500,000	1,534,000	102.27	6
BCRE01	Creative Property Services	220 Petaluma Ave.	Sebastopol	CA	95472	Sonoma	13,317,500	14,898,100	-1,580,600	-10.61	27
BCRE04	Creative Property Services	831 4th St	Santa Rosa	CA	95404	Sonoma	92,312,499	113,305,385	-20,992,886	-18.53	165
BCRE40	CPS/Property Advocates	6250 State Farm Drive	Rohnert Park	CA	94928	Sonoma	11,267,016	14,633,300	-3,366,284	-23.00	23
BCRE02	Creative Property Services	27046 A Maine St	Tombles	CA	95404	Sonoma	915,500	1,325,000	-409,500	-30.91	2
BSTAR	CPS-Healdsburg	Po Box 2027	Healdsburg	CA	95448	Sonoma	3,313,000	4,850,000	-1,537,000	-31.69	6
BCRE07	Creative Property Services	3209 Cleveland Ave	Santa Rosa	CA	95403	Sonoma	73,031,800	107,471,700	-34,439,900	-32.05	126
BCRE11	CPS Property Solutions	6641 Oakmont Dr Ste A	Santa Rosa	CA	95409	Sonoma	2,553,000	3,978,900	-1,425,900	-35.84	5
BCRE03	Creative Property Services	6450 Hembree Ln, Ste 155	Windsor	CA	95492	Sonoma	10,426,500	19,475,200	-9,048,700	-46.46	20
BCRE20	CPS Golden Land Realty	501 E Washington St	Petaluma	CA	94952	Sonoma	2,497,750	5,230,000	-2,732,250	-52.24	4
BCPS	CPS Santa Rosa West	3806 Sebastopol Rd	Santa Rosa	CA	95407	Sonoma	4,019,000	8,754,000	-4,735,000	-54.09	7
BCNA01	CPS/Country Air Properties	808	Lakeport	CA	95453	Lake	0	540,000	-540,000	N/A	0
BCRE30	CPS/Great River Properties	16250 Main St	Guerneville	CA	95446	Sonoma	0	811,000	-811,000	N/A	0
Office							216,687,565	296,772,585	-80,085,020	-26.99	391
Market							1,317,002,5...	1,795,901,3...	-478,898,856	-26.67	2,173

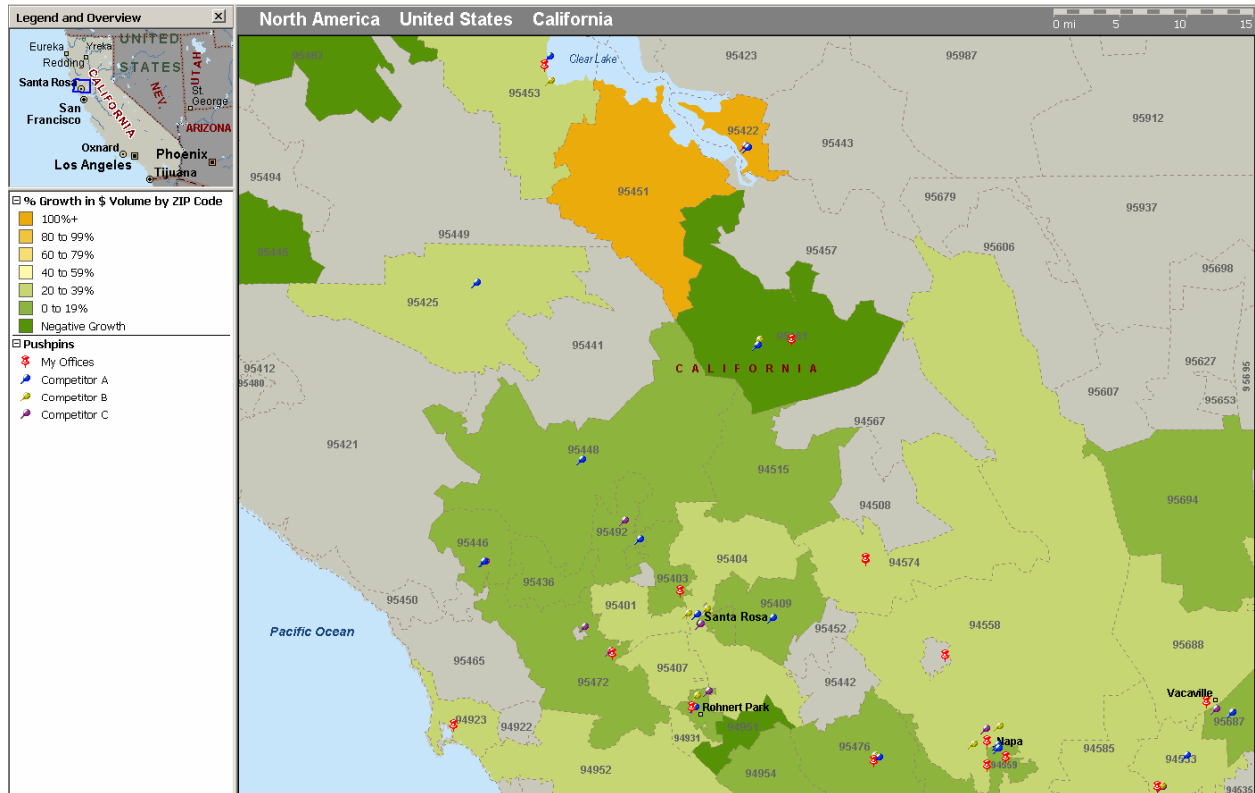
LTM = Last Twelve Months (e.g. 3/1/06-2/28/07)
PTM = Previous Twelve Months (e.g. 3/1/056-2/28/06)

Scroll to view additional columns.

Export

Export the information to a csv file for use with a geographic information system such as MapPoint.

- Overlay office locations (see Office Location, pg. 79) as pushpins to get a complete picture of how your offices are situated relative to prevailing market conditions.
- Compare any office's performance relative to these market conditions.
- Visually determine if there are any expansion opportunities available.



Market Dynamics

Allows you to better understand the movement of various market variables over time, from both a macro and micro perspective. For instance, you can view the median price trending for SFD homes over the whole MLS or for a very specific type, e.g. 4 BD homes in Plano.

Search Screen

- Property types and area types mirror your MLS system.
- Bedroom and bathroom criteria are available.
- Any price range can be used.
- Time period can cover either 2 Years (Monthly) or 6 Months (Weekly)

Search Results

- This tool measures changes to market conditions over 2 Years (Monthly) and 6 Months (Weekly).
- Each view consists of a chart page and a corresponding grid. Toggle between them using the chart and grid buttons
- The views are presented on 3 tabs: Price, Supply & Demand, and Sales Rate.
- Each chart page is comprised of 3 general areas: Chart Controls, Chart, and Key Information.



Chart Page

Chart Controls

Depending on the information displayed and time period selected in the search, some or all of the following features are available on each view:

Additional Data

Each chart has a default view which plots the primary data set. Certain charts allow you to add supplementary data sets by selecting the checkboxes.



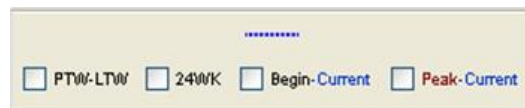
Information Overlays

Display certain values over the chart bars. The feature is available when one data set is plotted; it is inactive when supplementary data sets are added to the charts.



Demarcation Lines

These lines are placed across the width of the chart to depict monthly averages, and/or the values for the beginning and ending months. The feature is available when one data set is plotted; it is inactive when supplementary data sets are added to the charts.

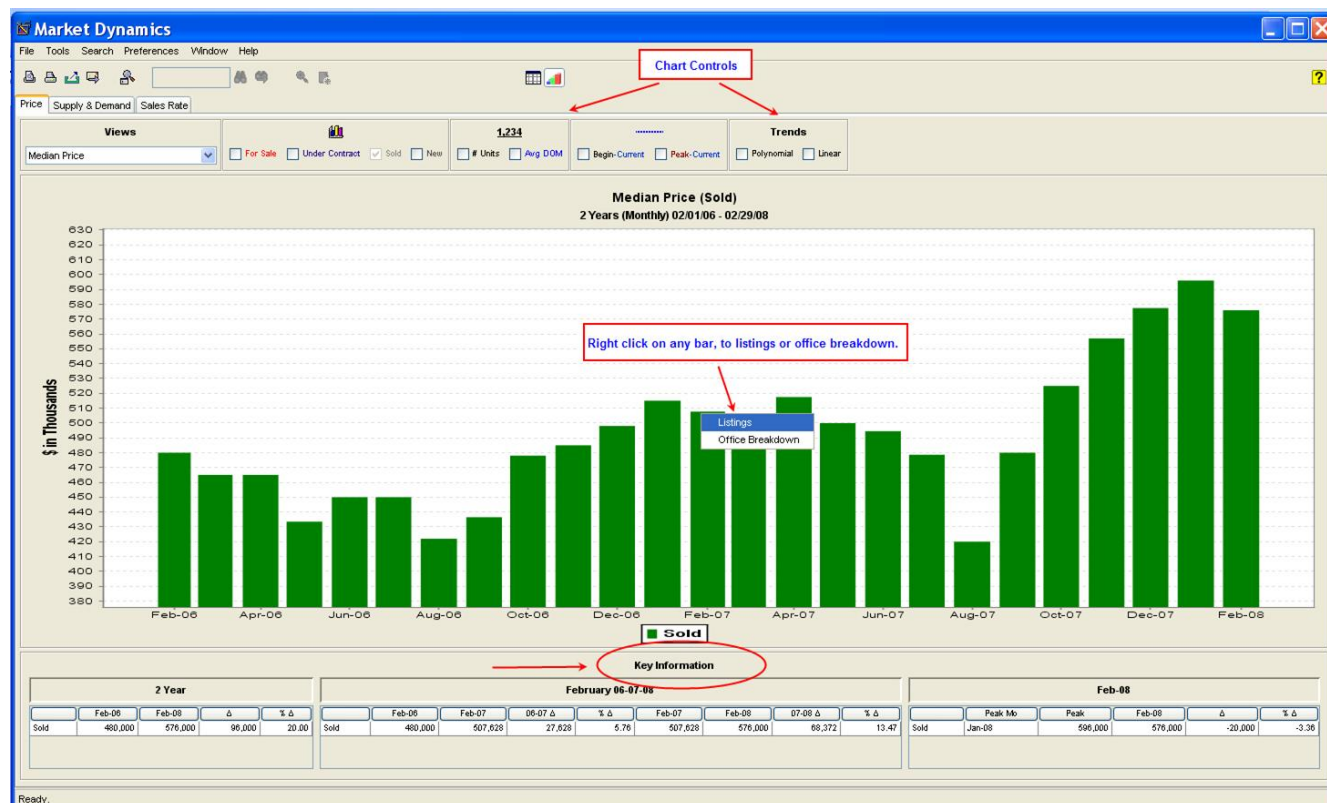


Trend Lines

Straight or polynomial (curved) trend lines are available for all views. The feature is available when any number of data sets are plotted; one line will be displayed for each data set.



Chart



Each chart is designed to convey certain specific information. You may customize the primary views by utilizing the chart controls described above. The Key Information grids below the charts, described below, help you interpret the data and provide important related information.

Office and listing information is available by right-clicking on a bar or data point on the chart.

- Click on **Listings** to view and/or export all listings for the month or week, depending on search criteria. There are separate tabs for each status based on the statuses selected in the chart control panel above the graph.
- Click on **Office Breakdown** for a list of the offices that are involved in the data calculations for that specific month or week. Right-click on a row in the Office Breakdown for Office Detail or Listing Detail.
 - Office Detail** provides addresses and contact information for the office.
 - Office Listings** displays the listings for that office. There are separate tabs for each status based on the statuses selected in the chart control panel above the graph. Right-click on a row in Listing Detail for the specifics of that listing.

Key Information

The area below the charts is divided into three sections for both 2 Year (Monthly) and 6 Months (Weekly) time periods

2 Year (Monthly) Information

2 Year

Focuses on the change in various market metrics over the entire (25-month) time period.

"Triplets"

Monitors the changes between the same calendar month over the last three years (e.g. Mar 05 – Mar 06 – Mar 07). Seasonal variation is thus isolated from this view, so that the focus remains strictly on the underlying market changes that have occurred year over year.

Current Month

Provides information on how the current month has changed from either the year before or the peak month of the entire time period (25 months).

Key Information									
2 Year					Triplets → February 06-07-08				
	Feb-06	Feb-08	Δ	% Δ		Feb-06	Feb-07	06-07 Δ	% Δ
Sold	480,000	576,000	96,000	20.00	Sold	480,000	507,628	27,628	5.76
							Feb-08	07-08 Δ	% Δ
							576,000	68,372	13.47
					Current month → Feb-08				
	Peak Mo	Peak	Feb-08	Δ	% Δ				
Sold	Jan-08	596,000	576,000	-20,000	-3.36				

6 Months (Weekly) Information

Last 24 Weeks

Focuses on the change in various market metrics for the entire 24 week time period.

PTW (Previous Twelve Weeks) vs LTW (Last Twelve Weeks)

Compares the averages of what is being measured over the last two 12-week periods. PTW represents the average for weeks 13 through 24 and LTW represents the average for weeks 1 through 12 (week 1 is the most recent week).

Current Week

Show the averages on how the current week has changed compared to the LTW averages.

24 weeks overview					PTW vs LTW comparison					Current Week				
Last 24 Weeks (10/22/07 through 03/31/08)					Averages (Previous 12 Weeks vs. Last 12 Weeks)					LTW Average vs. Current Week (03/31/08)				
	Wk 24	Current	Δ	% Δ		PTW Avg	LTW Avg	Δ	% Δ		LTW Avg	Current	Δ	% Δ
Sold	310,000	426,000	116,000	37.58	Sold	346,894	288,146	-58,699	-16.91	Sold	288,146	426,000	138,355	48.02

Grid Page

The grid page displays the data by month or week. The grid columns are color-coded to the statuses plotted on the corresponding chart.

Office and listing information is available by right-clicking on a row on the grid. Click on **Office Breakdown** for a list of the offices that are involved in the data calculations for that specific month or week. Right-click on a row in the Office Breakdown for Office Detail or Listing Detail. Click on **Listings** to view the listings that were calculated for that specific month or week.

Office Detail provides addresses and contact information for the office.

Office Listings displays the listings for that office. There are separate tabs for each status available for plotting on the corresponding chart. Right-click on a row in Listing Detail for the specifics of that listing.

Tabs

Price

This tab displays information depicting the movement of average and median prices based on the time period selected in the search criteria.

Supply & Demand

This tab portrays the relationships between the numbers of listings in each status category based on the time period selected in the search criteria.

Sales Rate

This tab illustrates the sales activity pace over the 25 months or 24 weeks. Two methods of calculating MSI (Months Supply of Inventory) are available:

NAR MSI

The number of properties For Sale on the last day of the month (FS#) divided by the number of properties that went Under Contract (UC#) during the month:

$$\text{NAR MSI} = \text{FS\#} \div \text{UC\#}$$

MSI

Terradatum's MSI calculation equals the number of properties For Sale (FS) during the month (that is, the property was Active at least one day during the month) minus the number of properties that went Under Contract (UC) during the month minus the number of properties that Expired (X) during the month, divided by the number of properties that went Under Contract (UC) during the month:

$$\text{TD MSI} = (\text{FS} - \text{UC} - \text{X}) \div \text{UC}$$

Basic Absorption

This chart monitors the amount of inventory versus the overall sales rate:

Inventory is broken down into two components:

New – Listing has an initial list date that falls during the month in question

Residual – The initial list date occurred prior to the month in question

Therefore, New Inventory is “freshly minted” for the month, and Residual Inventory includes listings that are being carried forward from earlier months.

Pricing Analysis

This tool provides real-time statistical information on the distribution of prices for a given set of property criteria over the last 12 months. The number of properties that were available for sale is compared with the number that sold and the number that are currently available.

Managers will use this tool to double-check agents' pricing skills; agents will use it as an aid to pricing listings correctly.

The information being relayed, within any given price segment, is this:

- The number of properties that were listed (Listed #) is a pure measure of the market size.
- The number of properties that actually sold (Sold #) compared with the number that were listed is a measure of market strength, i.e. as the percentage of sold to listed gets higher the market gets stronger.
- The amount of current inventory supply indicates the market sales-potential, i.e. whether the market has reasonable size and strength. A small inventory supply indicates that a well priced property would sell quickly; a large supply indicates a longer sales cycle.

Pricing Analysis Search Screen

- Property types and area types mirror your MLS system.
- Bedroom and bathroom criteria are available.
- Any price range can be used.
- Suggested Price: Enter the suggested price in the text box provided. This input is not required; however, entering a suggested price will help you focus the search results more precisely. If a Suggested Price is not entered, the Median Price of all properties meeting the search criteria will be used.

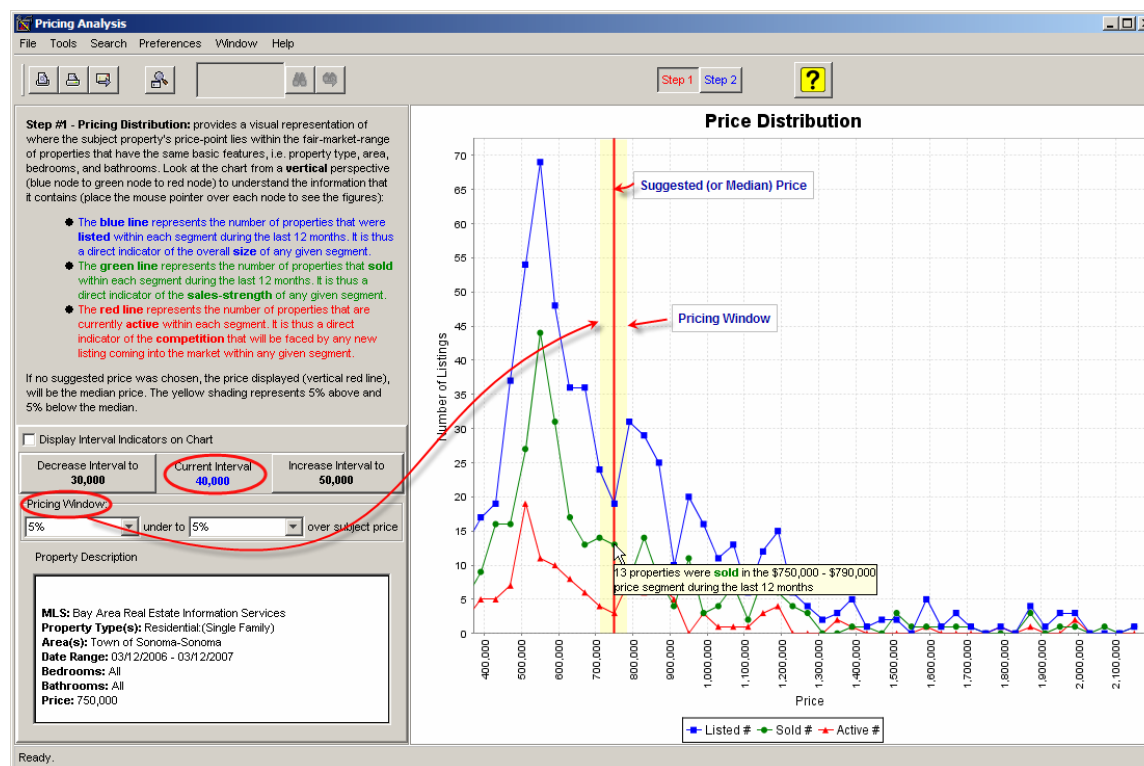
The screenshot shows the 'Search' window of the Pricing Analysis tool. It features a search bar at the top with 'Clear' and 'Search' buttons. Below this is an 'MLS' dropdown menu currently set to 'BAREIS'. The main section is divided into two columns. The left column, titled 'Property Types:', contains a list of property types with checkboxes: Residential (checked), Single Family, Condo/Coop, Farms/Ranches, Mobile/Floating Home, Mobile Home, Floating Home, Lots & Land, Residential, Commercial, and Acreage. The right column, titled 'Area Type:', has a dropdown menu set to 'Select an Area Type'. Below this is a table with two columns: 'Description' and 'Count'. At the bottom of the right column are 'Add', 'Remove', and 'Save' buttons. Below the property types list are sections for 'Bedrooms:' and 'Full Bathrooms:', each with radio button options for 'All', '0', '1', '2', '3', '4', '5+', and '3+'. At the very bottom, the 'Suggested Price:' text box is circled in red.

Results

Analyzing the results of a Pricing Analysis search is a two-step process:

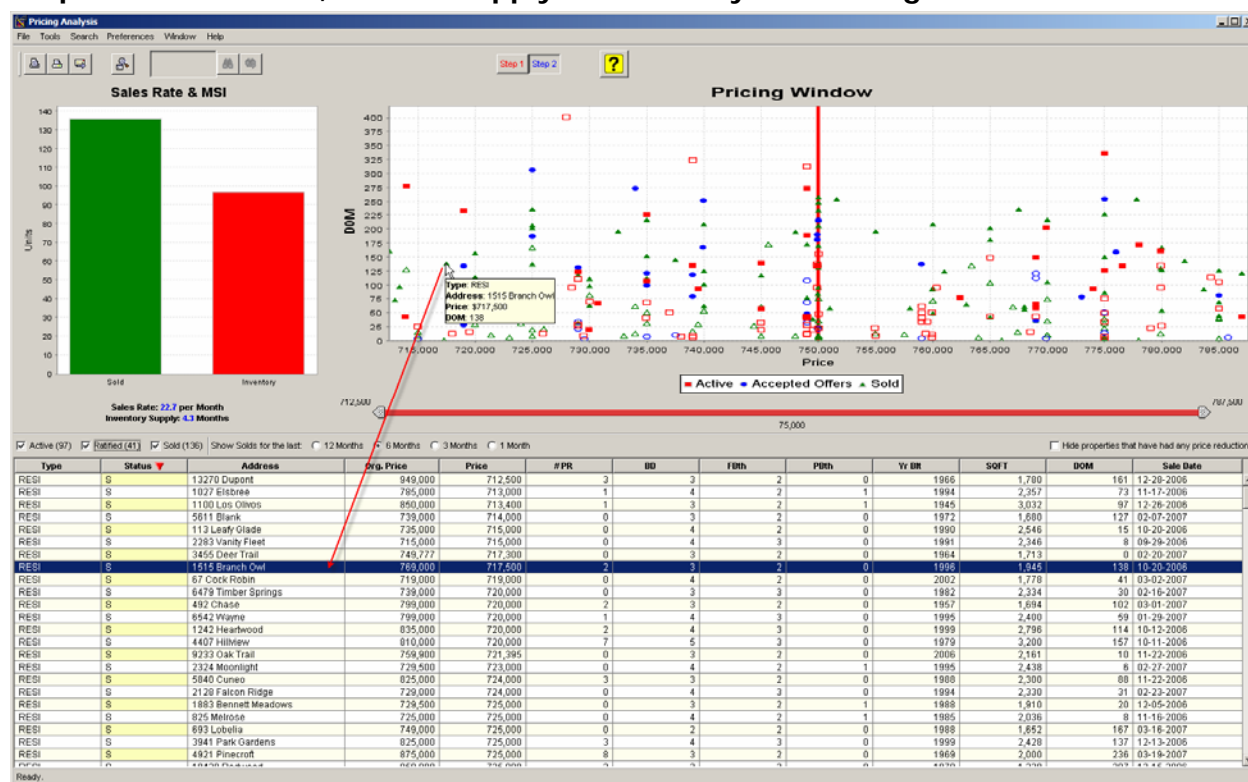
Step #1 – Price Distribution

The Price Distribution chart displays the last 12 months' price distributions, overlaid with current inventory. The suggested price of the subject property is indicated on the vertical red line, which shows how the property fits within the distribution curve. If a suggested price was not entered, the vertical red line will indicate the median price of all properties that meet the search criteria.



- Use the Interval and Pricing window controls to fine-tune the appropriate price intervals (depicted as data points on the chart) and pricing window size. The default pricing window (the yellow band) is 5% under and 5% over the suggested price of the subject property.
- Hold the mouse pointer over a data point on the chart to display the pricing interval and the number of properties that were sold or listed during the last 12 months (green and blue lines, respectively) or are currently for sale (red line).

Step #2 – Sales Rate, Months Supply of Inventory and Pricing Window



Sales Rate and MSI (Months Supply of Inventory)

This chart shows the monthly sales rate (the average number of units sold per month) and inventory supply (the number of months it would take to sell the properties currently on the market, based on the Sales Rate) for properties in the Pricing Zone (the market segment that includes the subject property).

Pricing Window

- The Pricing Window scatter graph displays the properties within the Pricing Zone relative to the subject property (the vertical red line).
- The DOM number is represented by the vertical height (loft) of each data point—e.g., the higher any data point, the longer it has been on the market.

Listings Grid

- The grid below the chart contains data on the specific properties in the Pricing Window. Click on a row to remove a property from the Pricing Window; click it again to restore it.
- Hold the mouse pointer over a data point on the chart to highlight the related row in the grid, and to display key information on the property (Property Type, Address, Price and DOM).
- Hollow symbols on the graph represent properties that have experienced no price reductions; solid symbols represent properties that have had at least one price reduction.

Fine-tuning

- Display Active, Ratified (Pending and Contingent), and/or Sold properties using the checkboxes above the grid. The chart initially displays only Sold properties.

- Display properties sold within the last 12, 6 (default), or 3 months, or within the previous one month, by clicking the radio buttons above the grid. The Sales Rate and MSI will recalculate accordingly.
- Hide properties that have had one or more price reduction(s) by clicking the checkbox at the right above the grid.
- Use the red slider bar to tighten up the pricing window (place the mouse pointer on one end of the slider, click, hold, and move the slider).

Performance Management

The *Performance Management* tool consists of two tabbed sections:

Measure Performance

Monitor Performance

Measure Performance



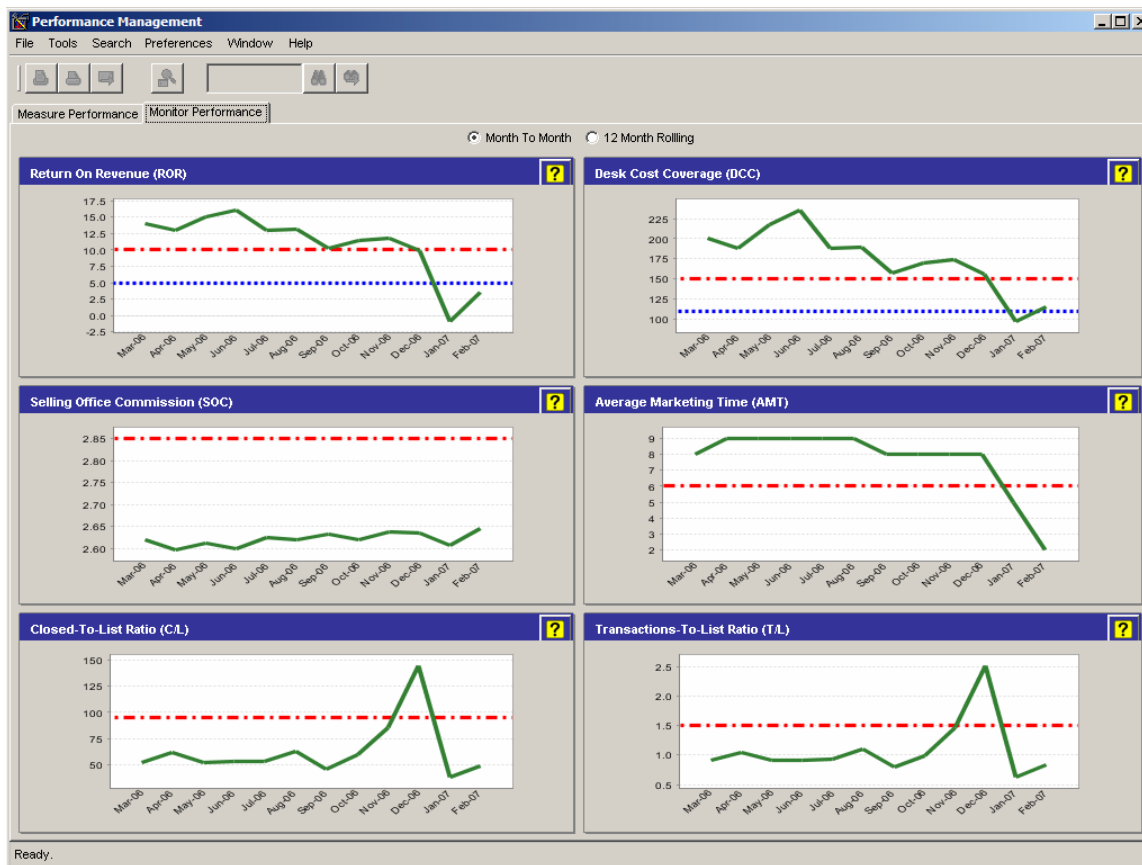
Provides a snapshot view of how efficiently your enterprise is operating, and allows you to project the effects of incremental changes in key financial and transaction elements. As you make changes by operating the spinners up or down, the resulting changes will be reflected in the What If row at the bottom of the page.

The Actual/What If summary grid shows the effects of changing one or more variables. For example, increasing the **Sold #** by 5% in the Closed-to-List Ratio section increases the Total \$, GCI, Agent \$ and Co \$, increasing the Net \$ by 3.7%. Return on Revenue (ROR) and Desk Cost Coverage (DCC) are improved as well; display the new, "What-If" values for these metrics by holding the mouse pointer over the bar representing "Office" on the respective charts.



- To change the numbers: Click on the up or down arrows, or type a new number into the box and press **Enter**.
- To reset the variables back to the actual values, click the Reset Actuals button at the top right.
- The dotted blue line on the Return on Revenue and Desk Cost Coverage charts represents the minimum target, or acceptable, value for this metric.

Monitor Performance



Allows you to measure the performance of your enterprise against the goals you have established.

The dashed red lines represent the annual goals.

The dotted blue lines on ROR and DCC represent the minimum target (acceptable) values for these metrics.

Depending on the radio button that is selected above the charts, the green lines on each chart display either:

- Monthly totals for the previous twelve months ("Month To Month"), OR
- Annual totals for the previous twelve months ("12 Month Rolling").

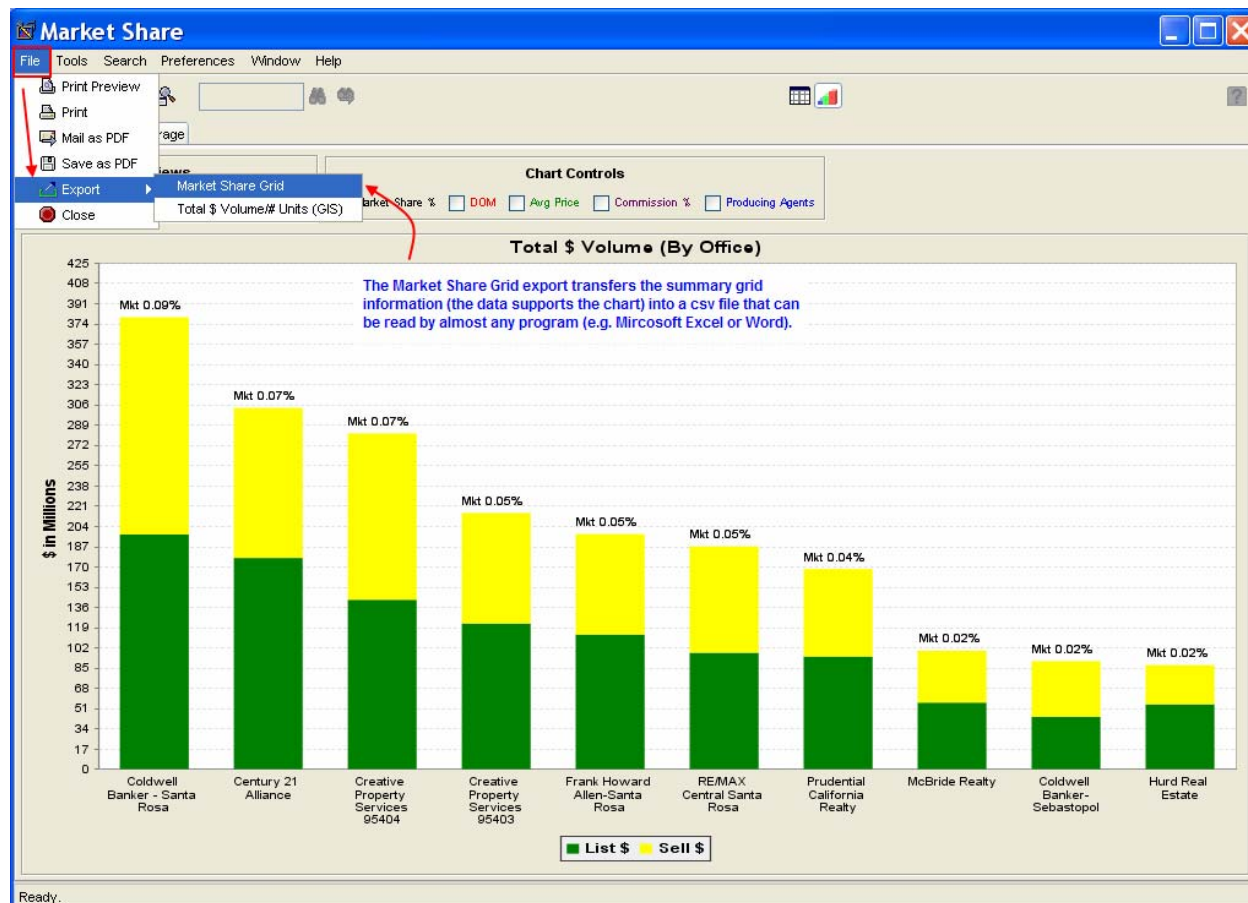
For example, if the 12 Month Rolling radio button is selected (at the top of the chart), the data point for Feb-07 on the Average Marketing Time chart represents the average number of days on market for all properties during the period March 1, 2006 through February 28, 2007. If the Month To Month radio button is selected, the time period represented is February 1 through 28, 2007.

Exports

BrokerMetrics® allows you to export data from many places in the program into a file that can be read and manipulated by other programs (e.g., Microsoft Excel, Microsoft MapPoint, etc.). These exports allow the user to extend the scope and power of the aggregated information with functionality from other sources.

A few examples will illustrate how to use the various exports:

Market Share Totals – Market Share Grid Export



- On the File menu select Export
- Choose 'Market Share Grid'
- This creates a CSV file that you will be able to save to your computer
- Using this CSV file you can chart just the Listing Side of the market share data if that is what's desired.



The example (pictured above) is a named CSV file exported from BrokerMetrics®

- Excel can read the CSV file format.
 - To access the data, open Excel and in the File pull-down menu, select Open.

- Browse on your computer to find the CSV file you created, then click Open.
- Once you have opened the file, you may need to format the data to create the chart and/or data table you desire.

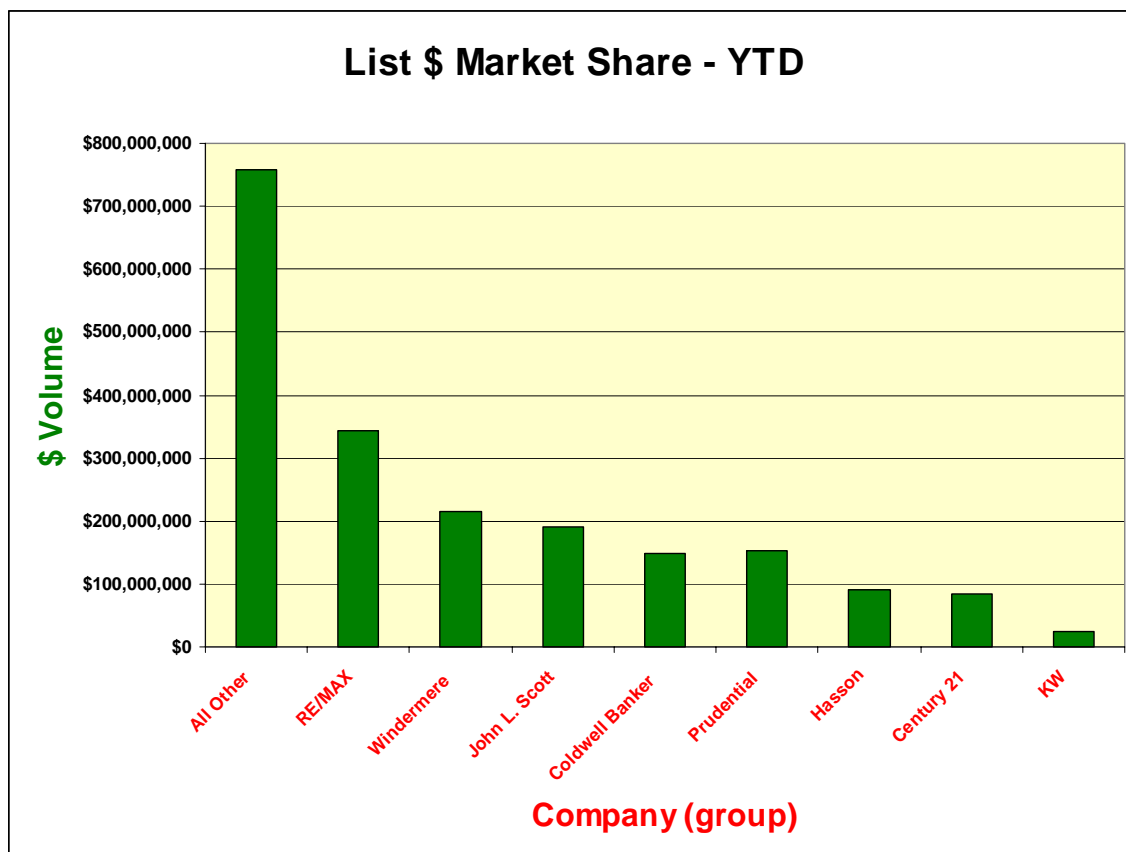
Microsoft Excel - Market Share Grid example.csv

File Edit View Insert Format Tools Data Window Help Adobe PDF

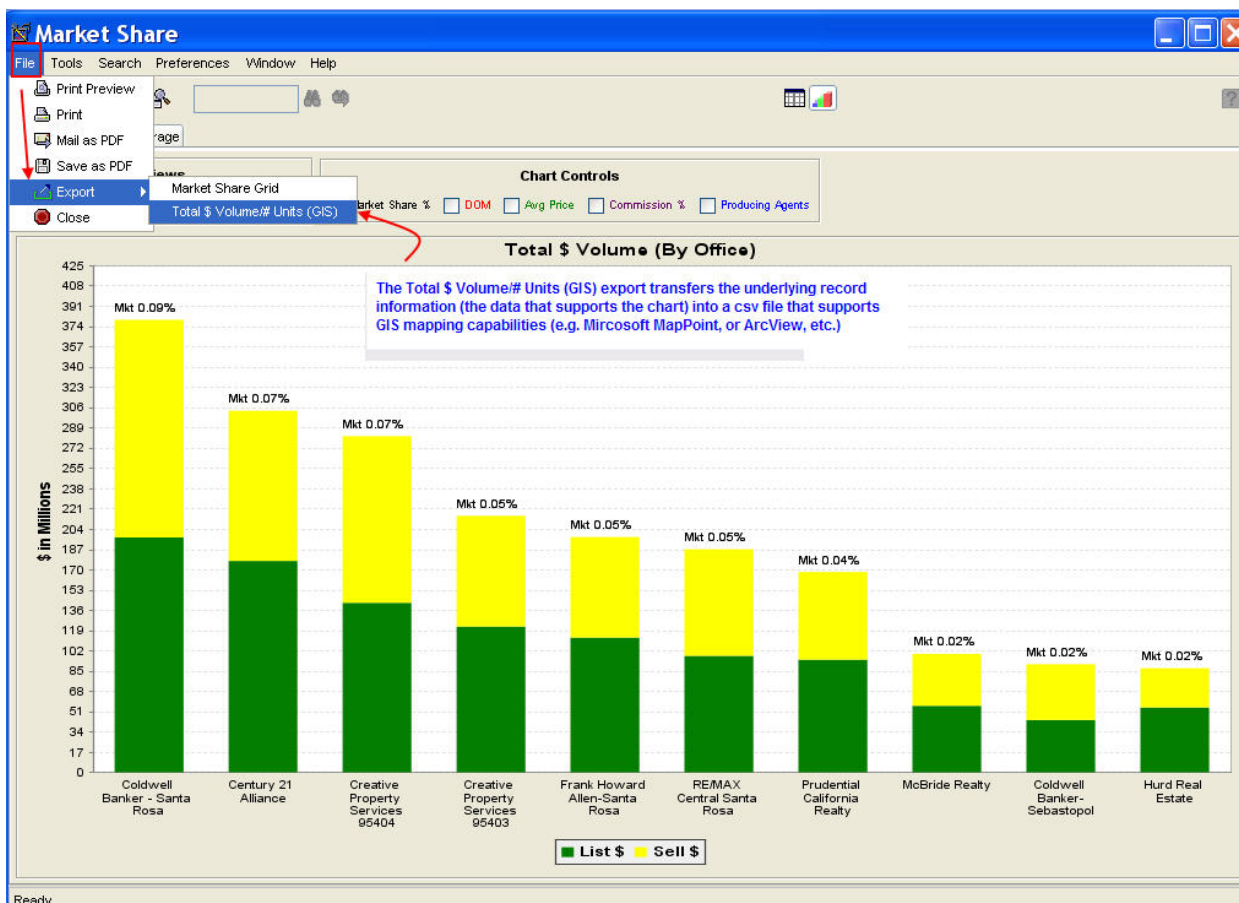
Open the csv file with Excel. Perform any formatting that is necessary. Then use Excel's charting function to chart the desired data.

	A	B	C	D	E	F	G	H	I	J	K
	#	Group	List #	List \$	Sell #	Sell \$	Total #	Total \$	# / Agent	\$ / Agent	Mkt %
1											
2	1	All Other	3315	\$758,690,401	3214	\$724,036,160	6529	\$1,482,726,561	1.5	336907	36.82
3	2	RE/MAX	1404	\$343,445,409	1454	\$357,102,391	2858	\$700,547,800	1.9	467655	17.4
4	3	Windermere	809	\$213,863,759	792	\$215,644,751	1601	\$429,508,510	1.6	417810	10.67
5	4	John L. Scott	822	\$191,010,515	779	\$188,519,043	1601	\$379,529,558	1.8	424530	9.42
6	5	Coldwell Banker	573	\$148,862,918	594	\$154,974,213	1167	\$303,837,131	1.6	410037	7.55
7	6	Prudential	667	\$152,272,107	675	\$149,510,929	1342	\$301,783,036	1.3	294998	7.49
8	7	Hasson	274	\$91,025,889	287	\$99,583,745	561	\$190,609,634	1.9	655016	4.73
9	8	Century 21	447	\$84,482,954	538	\$105,712,436	985	\$190,195,390	1.2	239541	4.72
10	9	KW	93	\$24,077,655	92	\$24,163,057	185	\$48,240,712	1.2	315299	1.2

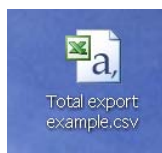
- Then use Excel's charting function to create the presentation you desire (the chart below was created with Excel's Chart Wizard).



Market Share Totals – Total \$ Volume/# Units (GIS) Export



- On the File menu select Export
- Choose 'Total \$ Volume/# Units (GIS)'
- This creates a CSV file that you will be able to save to your computer
- Using this CSV file you can chart just the Listing Side of the market share data if that is what's desired. This export also creates a CSV file but this time it has GIS "handles" (e.g. zip codes) into the underlying data records. As a result, GIS mapping software (e.g. MapPoint, ArcView) can read and display the file information on a map.



- The example (pictured above) is a named CSV file exported from BrokerMetrics®.
- GIS software, like Microsoft's MapPoint (), can read the CSV file format. To access the data, open the application (e.g., MapPoint) and on the File menu, select Open.
- Browse on your computer to find the CSV file you created, click Open.
- Once you have opened the file, you may need to format the data to create the chart and/or data table you desire.
- The example below uses Microsoft's MapPoint (), to present the information in the following manner.

